

MONTANA OFFICE of TOURISM UPDATE & REVENUE REPORT

Presented to the
Tourism Advisory Council
Sidney, Montana
October 5, 2010



MONTANA

Office of Tourism, Department of Commerce • October 2010

Department of Revenue ARM Proposal

- http://revenue.mt.gov/formsandresources/administrative_rules/hearingproposalnotices.mcp



MONTANA FILM OFFICE



HIGHLIGHTS...

Studio 406 Contest Winner, Marty Katz
June 2010



STUDIO
406
The incentive package of the
MONTANA FILM OFFICE

"Big Sky Country ... there's something
unlike anywhere else in the country."
Marty Katz, Los Angeles Producer

MONTANA: THE ULTIMATE LOCATION
A five-part web series documenting a film scout through south central Montana

UNDAUNTED COURAGE



MONTANA

Office of Tourism, Department of Commerce • October 2010

MONTANA OFFICE of TOURISM



Ticketmaster - Help - Windows Internet Explorer

http://www.ticketmaster.com/h/retaillocations.html

Google

My Ticketmaster | Gift Cards | Retail Outlets | Help

ticketmaster®

Enter Artist, Team, or Venue **Search**

Greater Seattle Area

Change Location

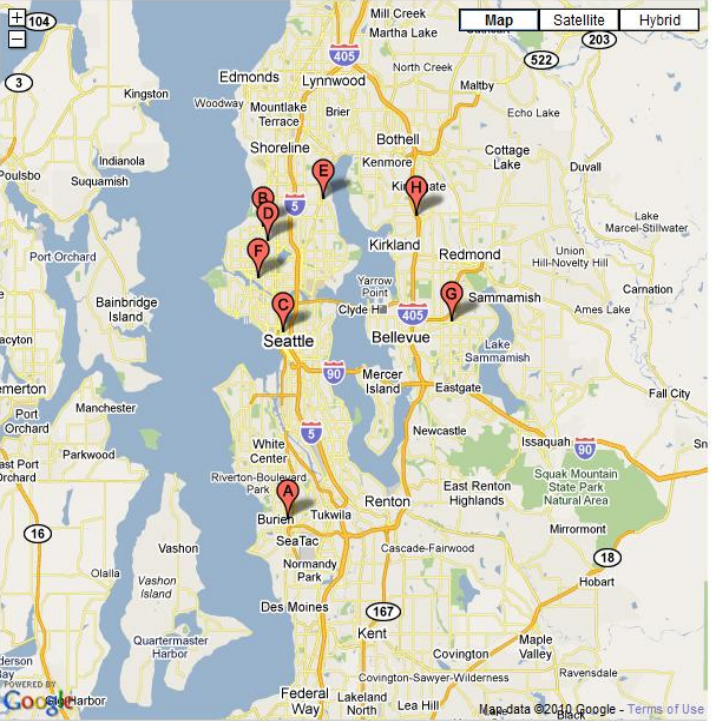
Home Music Sports Arts & Theater Family Welcome. Sign In

Retail Outlet Results

Back to Search 1-8 of 80 next

Gift Card Retail Outlet Pickup

A	Fred Meyer Fred Meyer Home Electronics 14300 1st Avenue Seattle, WA 98168 Directions & Details	0.0 mi
B	Kroger qfc Post Office 9999 Holman Road Nw Seattle, WA 98117 Directions & Details	0.0 mi
C	TICKETMASTER RETAIL OUTLET Key Arena Seattle Center Box Office @ Key Arena 305 Harrison Street Seattle, WA 98109 Directions & Details No Retail Outlet Pickup	0.0 mi
D	Fred Meyer Fred Meyer Home Electronics 100 Nw 85th Street Seattle, WA 98117 Directions & Details	0.0 mi
E	Fred Meyer Fred Meyer Home Electronics 13000 Lake City Way Ne Seattle, WA 98125 Directions & Details	0.0 mi
F	Fred Meyer Fred Meyer Home Electronics 915 Nw 45th Street Ballard, WA 98107 Directions & Details	6.0 mi
G	Fred Meyer Fred Meyer Home Electronics Bellevue Square 2041 148th Ave NE Directions & Details	8.4 mi



Map Satellite Hybrid

Map data ©2010 Google - Terms of Use

2:56 PM 9/30/2010

GLACIER &
YELLOWSTONE

THINGS TO DO

EXPLORE MONTANA'S
REGIONS & TOWNS

PLACES TO STAY

TRANSPORTATION

VISITOR
SERVICES

MT.GOV

BEST WESTERN HELENA GREAT NORTHERN HOTEL

BOOK NOW

<http://www.gnhotelshelena.com>
Email: carol@gnhotelshelena.com

Best Western Helena Great Northern Hotel is themed reminiscent of the Great Northern Railroad days. Conveniently located in the Great Northern Town Center, we're within minutes of downtown Helena and adjacent to Carroll College. Our 101 room hotel is 100% non-smoking. Each room has free high speed wireless Internet, voice mail, data port phones, in-room coffee, Pay Per View movies and Nintendo. Wind down from a long day's work in our indoor pool, enjoy the hot tub or workout in our 24-hour fitness center. We have a guest laundry, complimentary airport shuttle service and a 24-hour business center. Let us start your day right with our complimentary deluxe continental breakfast. We offer hot and cold cereal, fresh fruit, waffles, assorted muffins, pastries and breads, and a variety of juices and hot beverages.

You can turn to us with confidence for your important business functions. Our spacious conference center has over 8,000 square feet of meeting space. We can easily accommodate groups of up to 500 people. Our professional staff will assist you with planning and coordinating your important function.

There are several options for fine dining, quick lunching or espresso on the go within walking distance of our front door. Amuse yourself at the Great Northern Carousel and shop for gifts and treats from the area stores. Catch a movie at the new eight-plex Cinemark Theater. You can also ride the trolley to the historic downtown for shopping and restaurants.



HOURS AND SEASON

SERVICES OFFERED:



View Larger Image Gallery

MAP AND DRIVING
DIRECTIONS





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[HOTEL LOCATIONS](#)

[BEST WESTERN PREMIER HOTELS](#)

[NEW HOTELS](#)

[QUESTIONS & ANSWERS](#)

[Select Occupancy](#)

[Select Room](#)

[Review & Reserve](#)

[Confirmation](#)

Find a Hotel - Select Occupancy

Your Search Request

Destination:
Helena
Montana
United States

[Change Destination >](#)

Check-In:
18, May 2010

Check-Out:
19, May 2010

For reservations
(U.S. and Canada)
by phone call:
1-800-780-7234
or contact any of our
[Worldwide Reservation Numbers](#)

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Lowest rates, guaranteed.
No online booking fees.
Earn rewards points.

[Learn More >](#)

Best Western Helena Great Northern Hotel



835 Great Northern Boulevard US Helena, Montana, 59601-3315, United States
Phone: 406/457-5500

This newly built Helena Montana hotel provides extensive amenities with decor reminiscent of the Great Northern Railroad days. With 8,000 square feet of adjustable space and... [More Hotel Information >](#)

Select Travel Dates [Help >](#)

Check-In:

05/18/2010

Check-Out:

05/19/2010

Flexible Schedule?

[View Availability Calendar \(optional\) >](#)

Select Occupancy and Rates [Help >](#)

Room(s):

19 years and older

18 years and younger

[Select Rate Plan >](#)

Guests per Room 1:

Show All Rates

Children 18 And Under Are Free In Room With One Paying Adult In Existing Bedding.

Special Rate Plan

If you have a Promotion Code or if you have a Best Western Corporate Account, please enter your information below to view your rates:

[Promotion Code >](#)

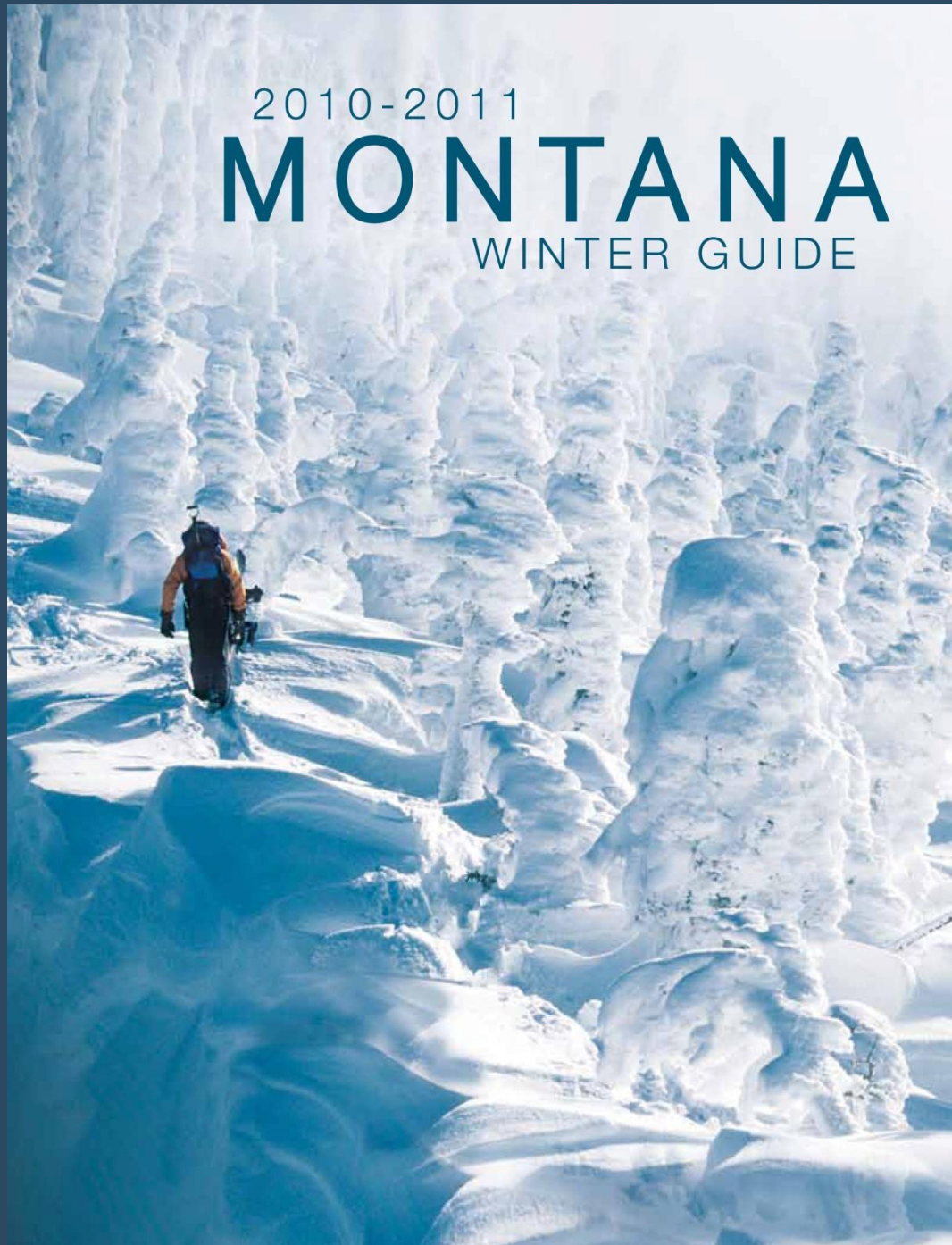
[Corporate ID Number >](#)

[View Available Rooms](#)

PUBLICATIONS

New Winter Guide
2010-2011

2010-2011
MONTANA
WINTER GUIDE



PUBLICATIONS STUDY

GEO-TRAVELERS AND TRAVEL PLANNING

The vacation planner has limited relevance for the geo-traveler...

- *“I, too, have not used one of these planning guides, mainly because I use the Internet to find this kind of information.”—Carey (Geo-Potential)*
- *“I have not used these types of brochures before (I know my parents have)...I just wouldn’t order them...I rely more on the Internet to research a trip. I also like guide books (Lonely Planet, Rough Guide, Luxe) and tend to use my iPhone apps for emergency planning situations.”—Amy (Geo-Core)*

- Planner is a symbol of the past—doesn't connect with the Geo-Traveler and how they plan and travel now.
- Cynicism around the genre impacts usage and consideration
 1. Advertising/paid placement system undermines authenticity and credibility
 2. *“Not a resource for me”*
 3. Large advertising section overshadows any interesting content and puts the publication out of alignment with Geo-Traveler's sensibilities and values

- *“I think [these types of planners] tend to be overly heavy on the ads and faux articles, so they haven’t felt super valuable to me whereas a guide book like Lonely Planet, say, or the travel section of the NY Times feels full of authentic information. Also, doing so much online research makes something like this feel obsolete.”—Liz (Geo-Core)*
- *“Initial reaction...’wow this looks cool’...It has a nice glossy cover with an amazing picture...then when you open it up it was like ‘gotcha!’ All I saw were the listings of different hotels and restaurants and immediately thought ‘oh, tourist crap’.”—Cale (Geo-Potential)*

- Visuals are inspiring but need more
- Itinerary and calendars tap into Geo-Traveler sensibilities speaks directly to the Geo-Traveler's desire for local and specific content
- Liked how planner drives interest to digital content
- Providing context about areas is real and meaningful—liked the regional sections of guide

Travelers envision using the planner after arrival

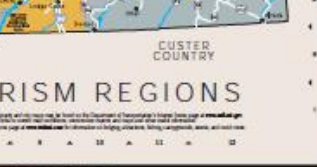
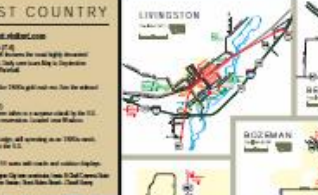
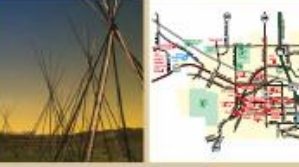
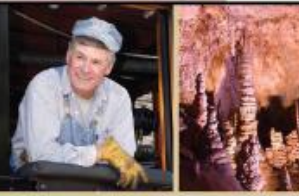
- Receptive to some of the content if they came across it after arrival
- Currently considered and imagined as limited resources after arrival, if discovered

Five most important take-aways from Stanford Consulting Study

- Target audience doesn't know the Vacation Planner exists.
- Target audience plans online.
- Target audience uses Internet, social media/reviews, and guide books similar to Lonely Planet to help decide what to see and do.
- Target audience is more likely to use guide after arrival showing interest in photos, events and attractions/itineraries listed in each region.
- Target audience believes advertising undermines authenticity and credibility. Large advertising sections overshadow and interesting content.



GLACIER COUNTRY
 MISSOULA
 800.374.5372 • glacierinfo.com
 Glacier National Park (GLNP)
 The National Park Service manages the Glacier National Park and the surrounding area. The park is located in the western part of Montana and is known for its stunning scenery, including glaciers, lakes, and mountains. The park is a popular destination for hikers, campers, and nature lovers. The park is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The park is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.



RUSSELL COUNTRY

800.527.4348 • russellcountry.com
 Russell County is a beautiful area in the heart of Montana. It is known for its stunning scenery, including mountains, lakes, and forests. The county is a popular destination for hikers, campers, and nature lovers. The county is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The county is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

MISSOURI RIVER COUNTRY

800.623.3319 • missouri-river.com
 Missouri River Country is a beautiful area in the heart of Montana. It is known for its stunning scenery, including mountains, lakes, and forests. The county is a popular destination for hikers, campers, and nature lovers. The county is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The county is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

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CUSTER COUNTRY

800.346.1876 • custerinfo.com
 Custer National Monument (CNM)
 The National Park Service manages the Custer National Monument and the surrounding area. The monument is located in the eastern part of Montana and is known for its stunning scenery, including mountains, lakes, and forests. The monument is a popular destination for hikers, campers, and nature lovers. The monument is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The monument is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

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GOLD WEST COUNTRY

800.374.5372 • goldwestinfo.com
 Gold West Country is a beautiful area in the heart of Montana. It is known for its stunning scenery, including mountains, lakes, and forests. The county is a popular destination for hikers, campers, and nature lovers. The county is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The county is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

LIVINGSTON

Livingston is a beautiful town in the heart of Montana. It is known for its stunning scenery, including mountains, lakes, and forests. The town is a popular destination for hikers, campers, and nature lovers. The town is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The town is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

YELLOWSTONE COUNTRY

800.736.8776 • yellowstoneinfo.com
 Yellowstone National Park (YNP)
 The National Park Service manages the Yellowstone National Park and the surrounding area. The park is located in the northern part of Montana and is known for its stunning scenery, including mountains, lakes, and forests. The park is a popular destination for hikers, campers, and nature lovers. The park is also home to many rare and endangered species, including the grizzly bear, bison, and elk. The park is a UNESCO World Heritage Site and is one of the most beautiful places in Montana.

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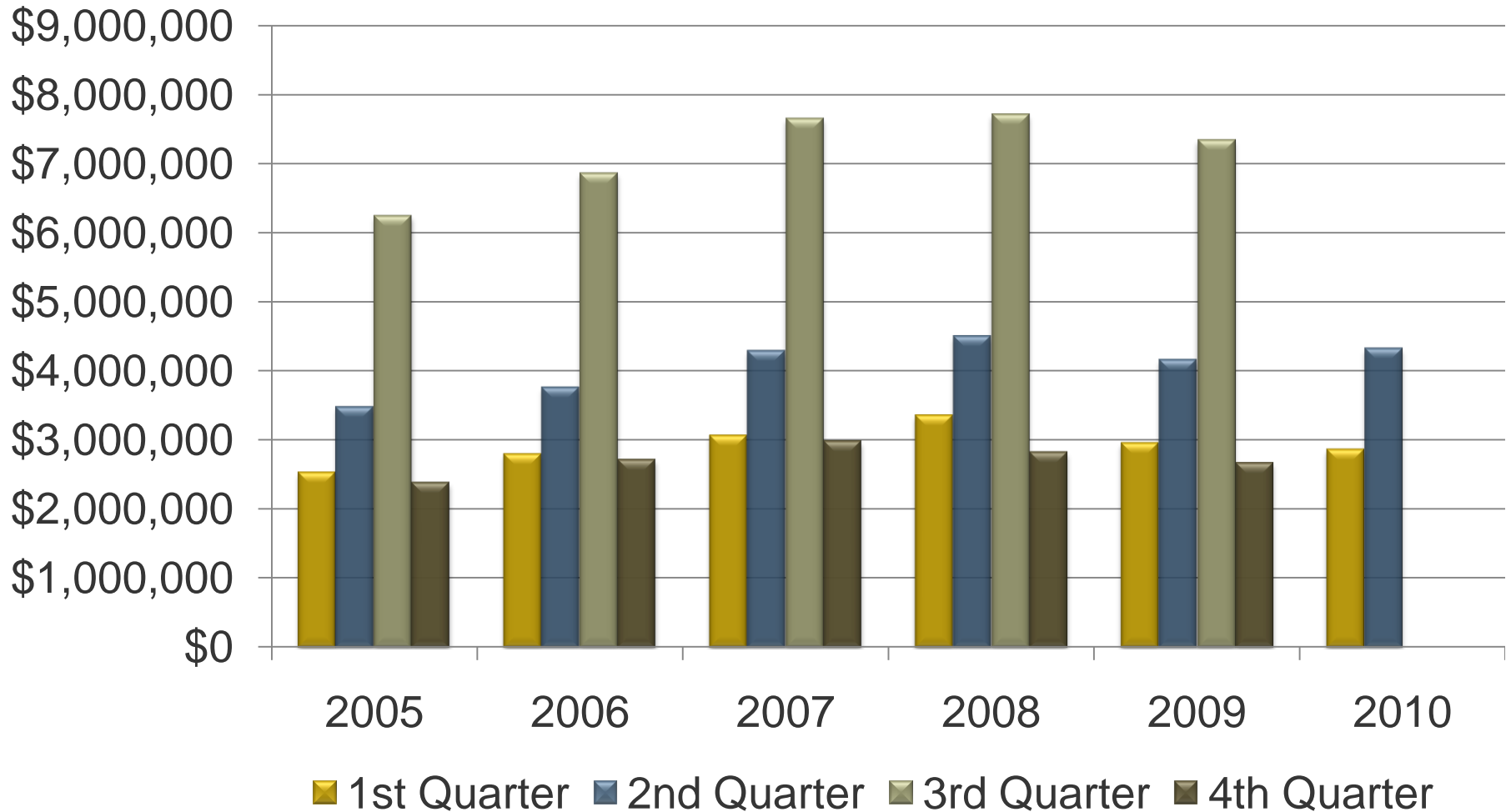
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REVENUE UPDATES

BED TAX COLLECTIONS 2005-2010

STATEWIDE COLLECTIONS



Data Source-MT Dept. of Revenue

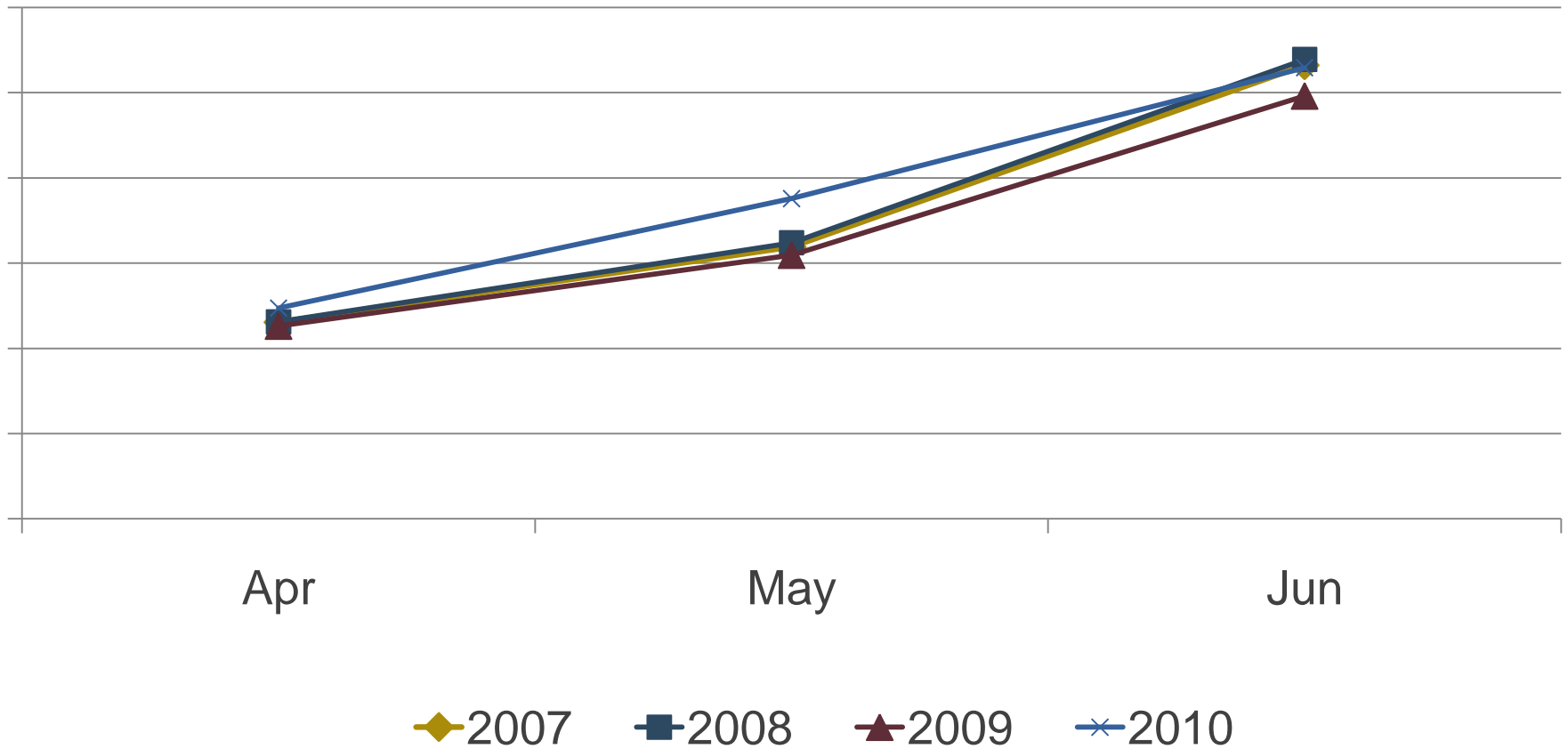
MONTANA

Office of Tourism, Department of Commerce • October 2010

2007-2010 2nd QUARTER
7% LODGING TAX
MONTHLY COLLECTIONS
REPORTED TO THE
DEPARTMENT OF REVENUE

*(Only reflects those businesses that have
voluntarily reported monthly figures)*

STATEWIDE COLLECTIONS



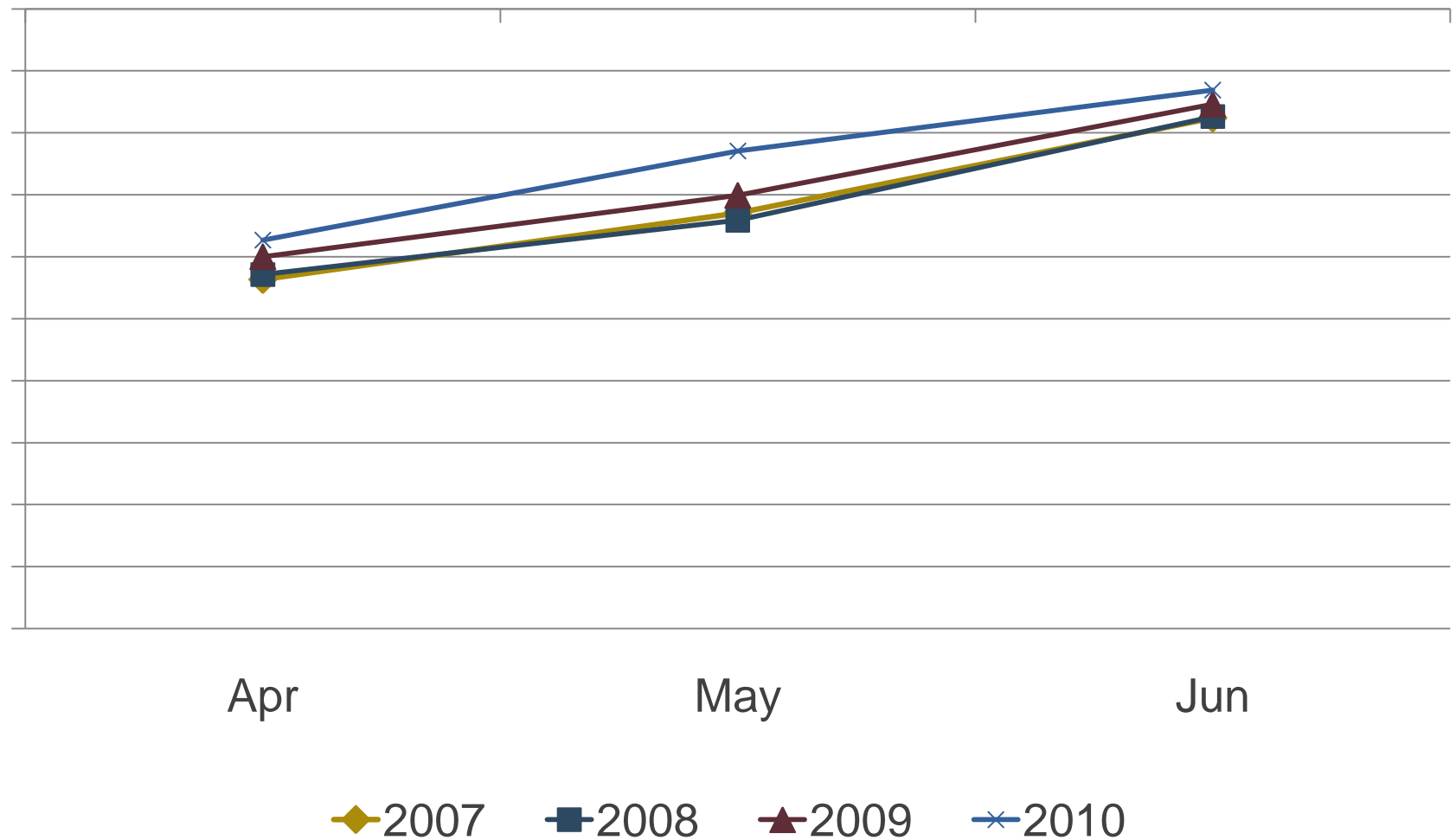
Data Source-MT Dept. of Revenue

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TOURISM REGIONS/CVBs (Counties w/CVBs)

CUSTER COUNTRY



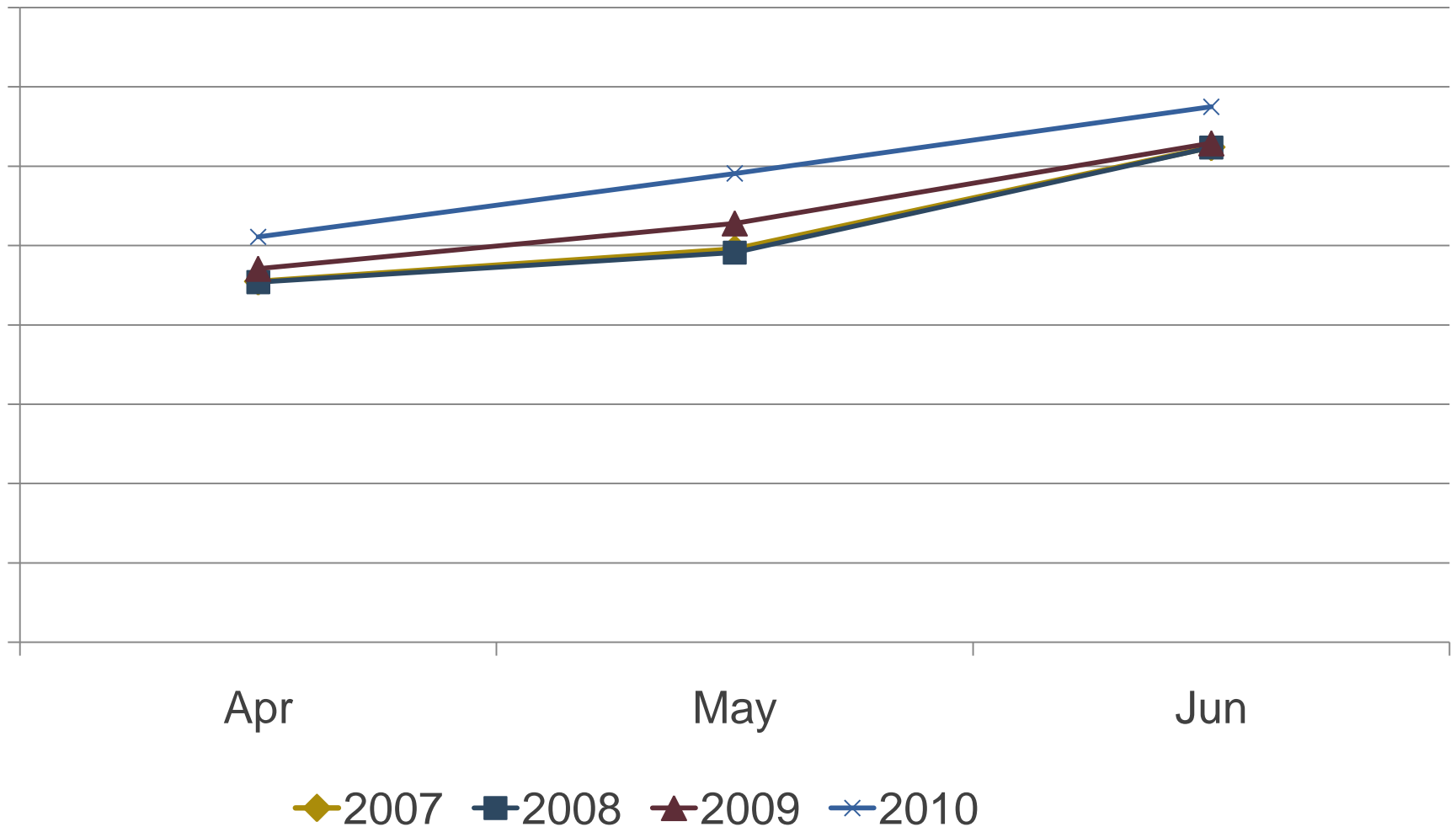
Data Source-MT Dept. of Revenue

MONTANA

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YELLOWSTONE COUNTY

(Inc. Billings)



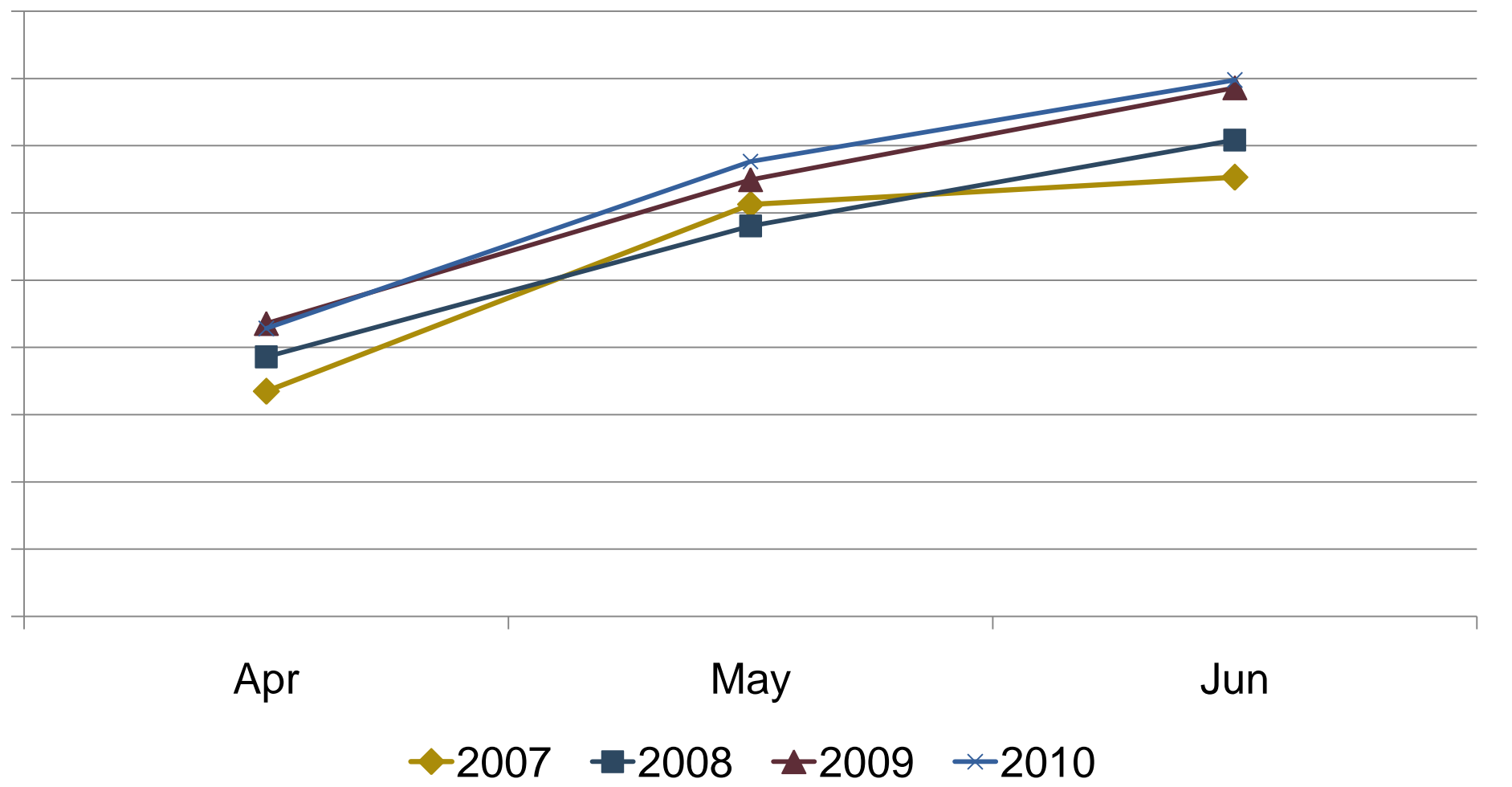
Data Source-MT Dept. of Revenue

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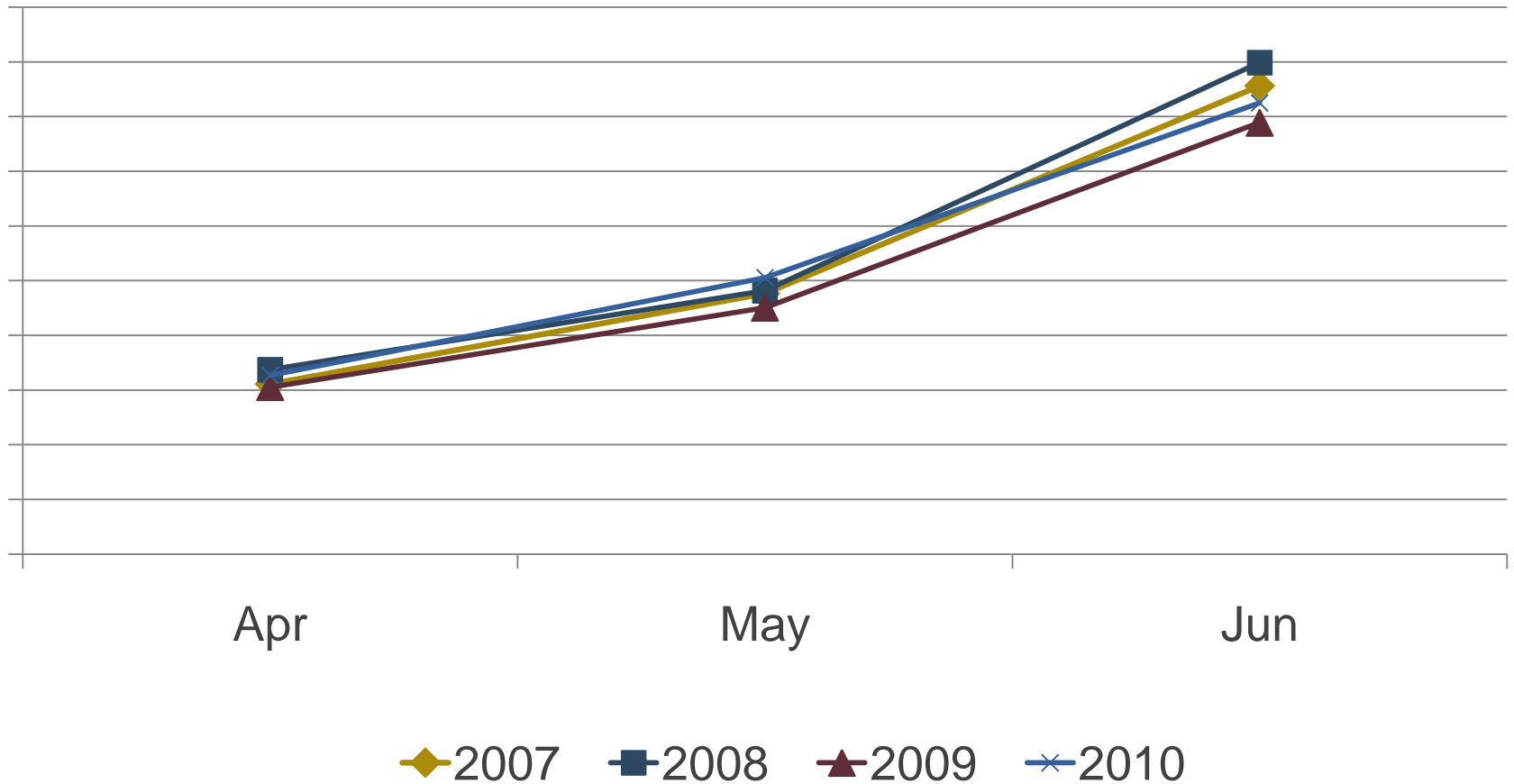
CUSTER COUNTY

(Inc. Miles City)



Data Source-MT Dept. of Revenue

GLACIER COUNTRY



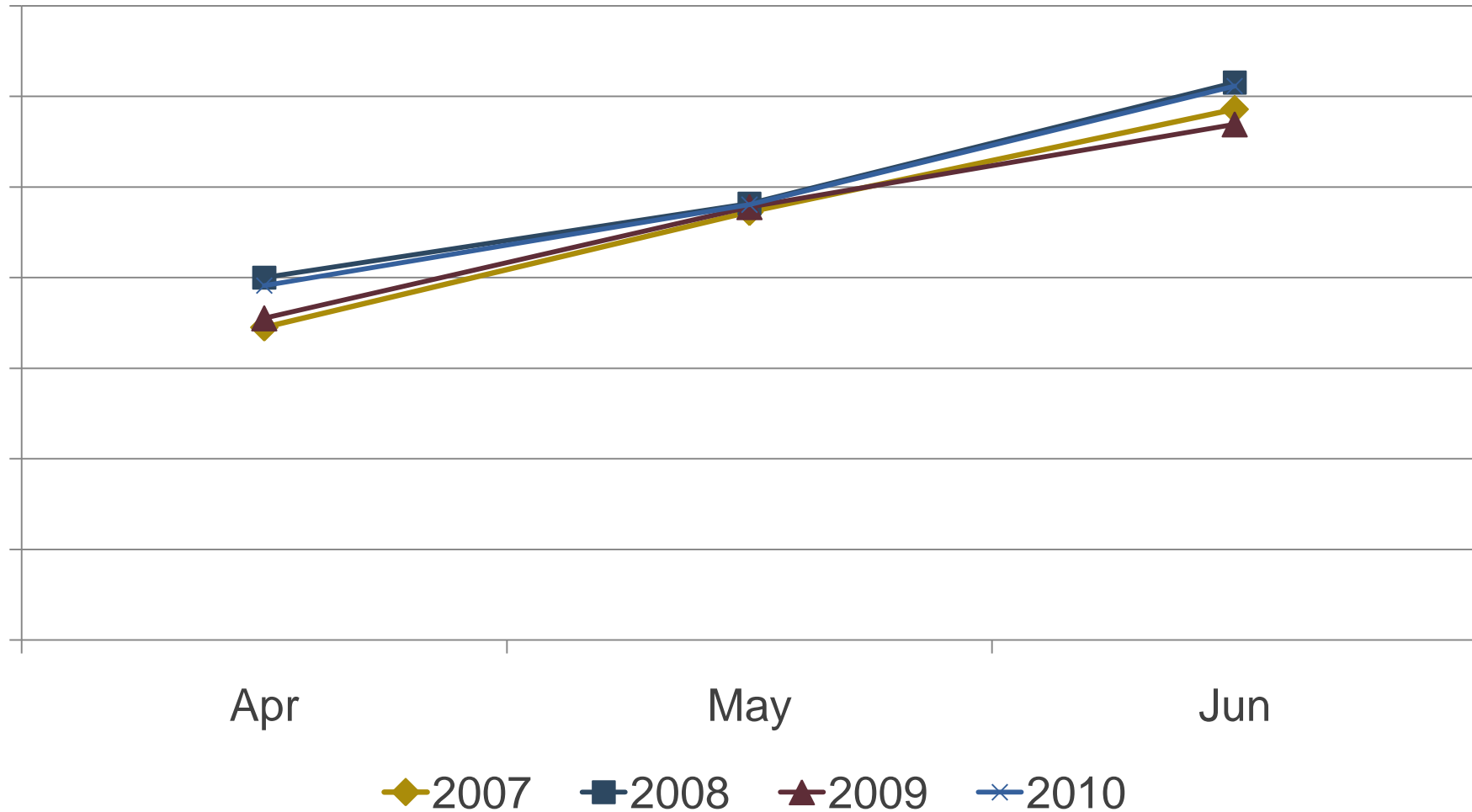
Data Source-MT Dept. of Revenue

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MISSOULA COUNTY

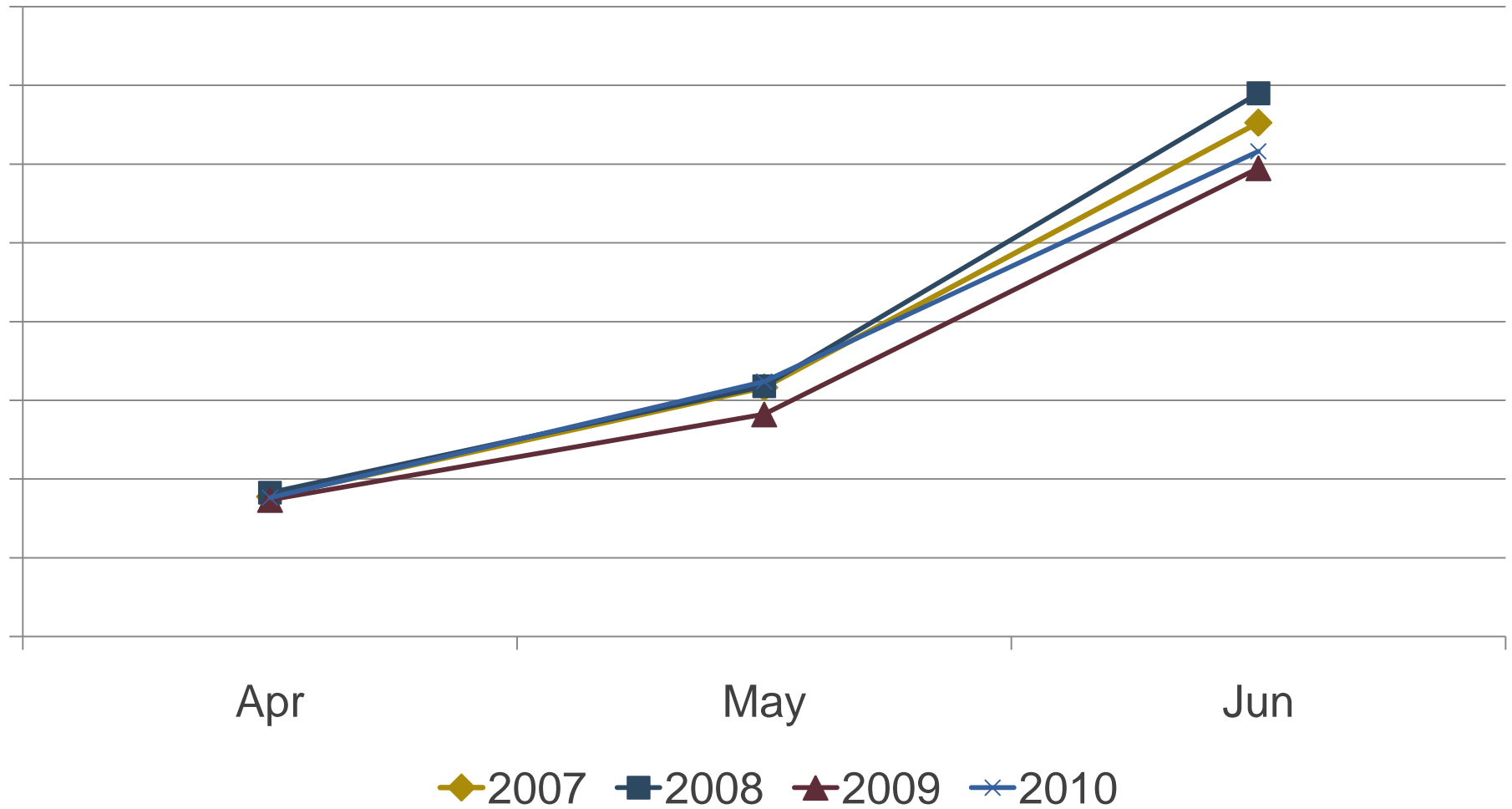
(Inc. Missoula)



Data Source-MT Dept. of Revenue

FLATHEAD COUNTY

(Inc. Kalispell & Whitefish)

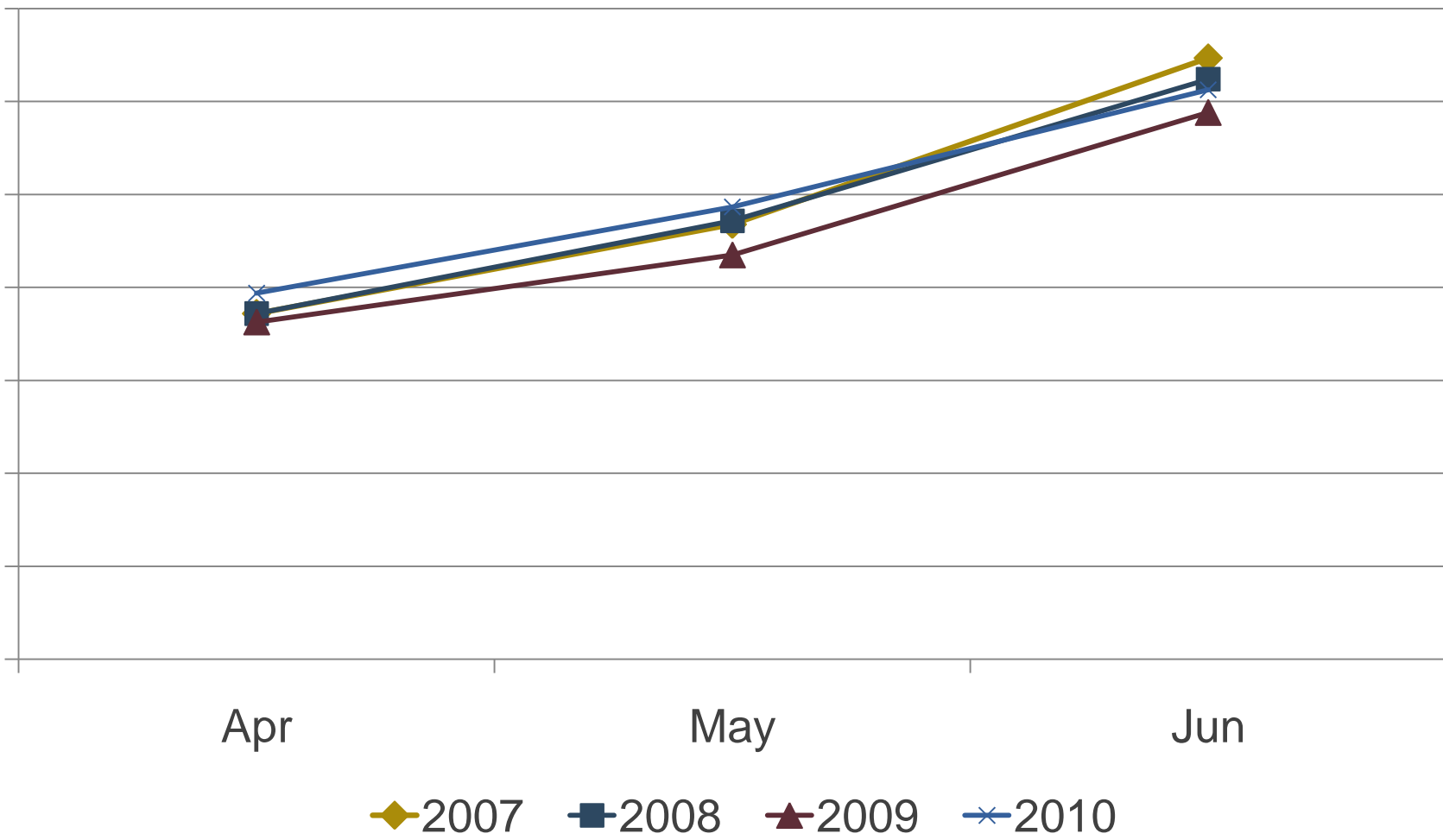


Data Source-MT Dept. of Revenue

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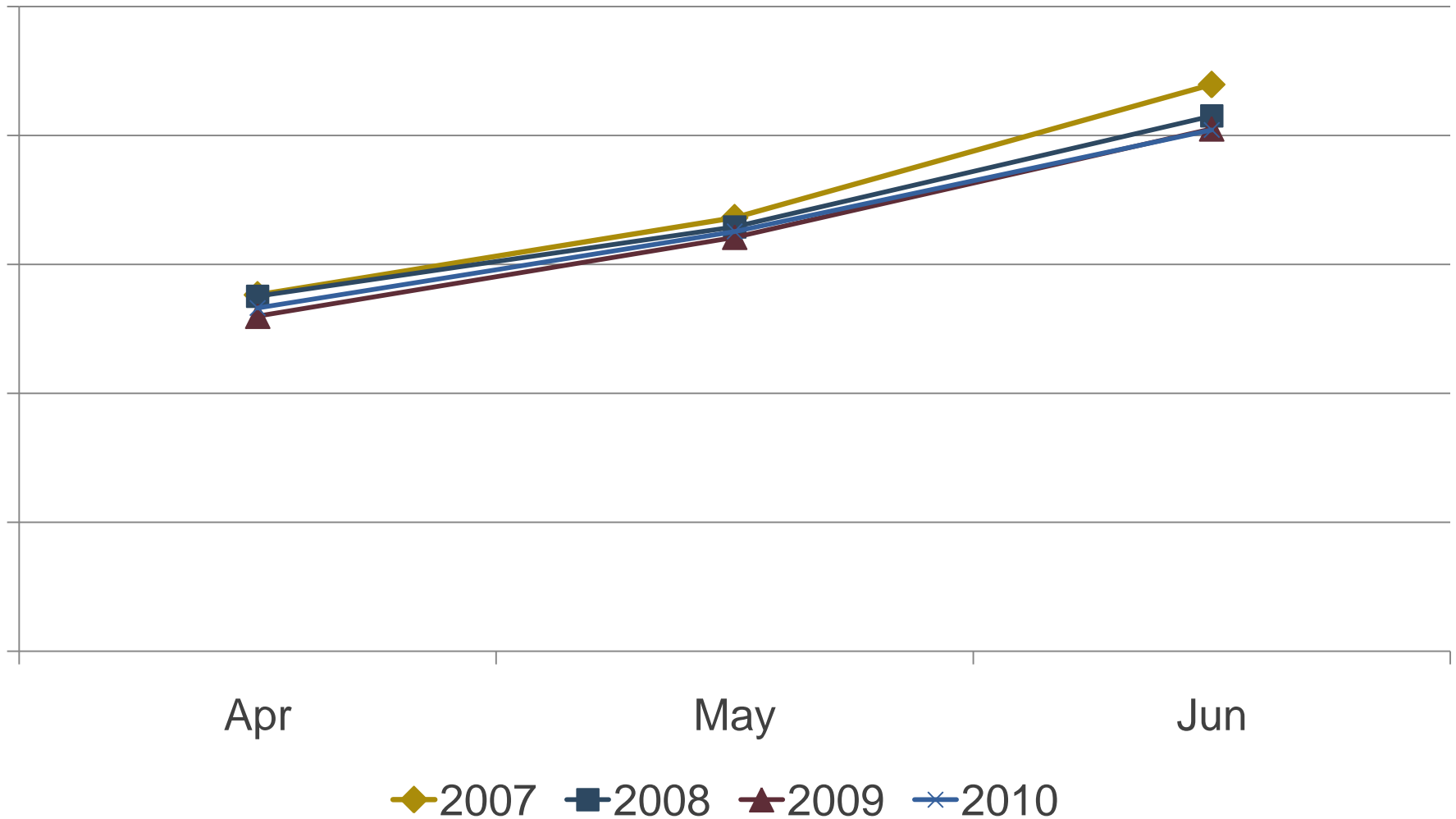
GOLD WEST COUNTRY



Data Source-MT Dept. of Revenue

SILVER BOW COUNTY

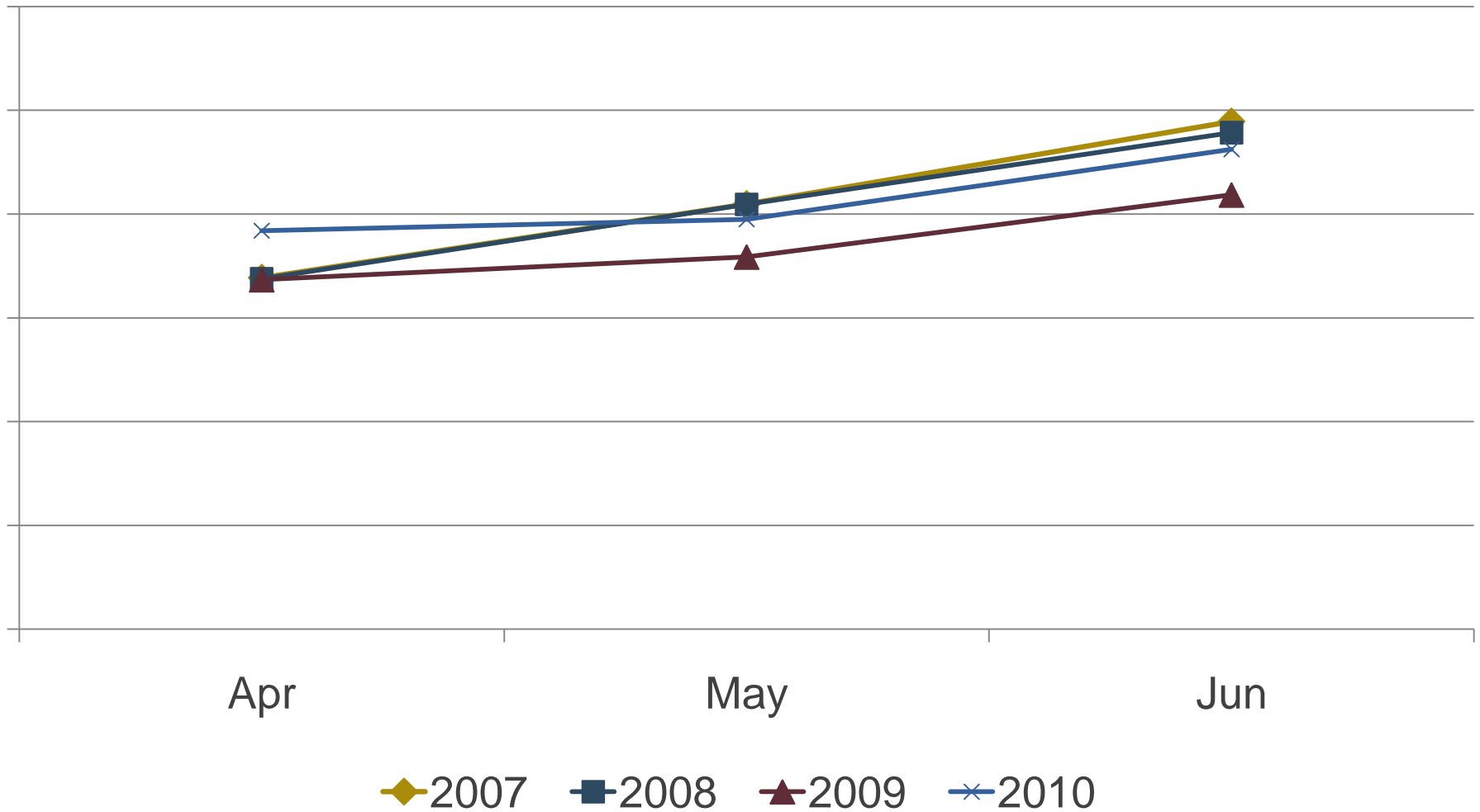
(Inc. Butte)



Data Source-MT Dept. of Revenue

LEWIS & CLARK COUNTY

(Inc. Helena)

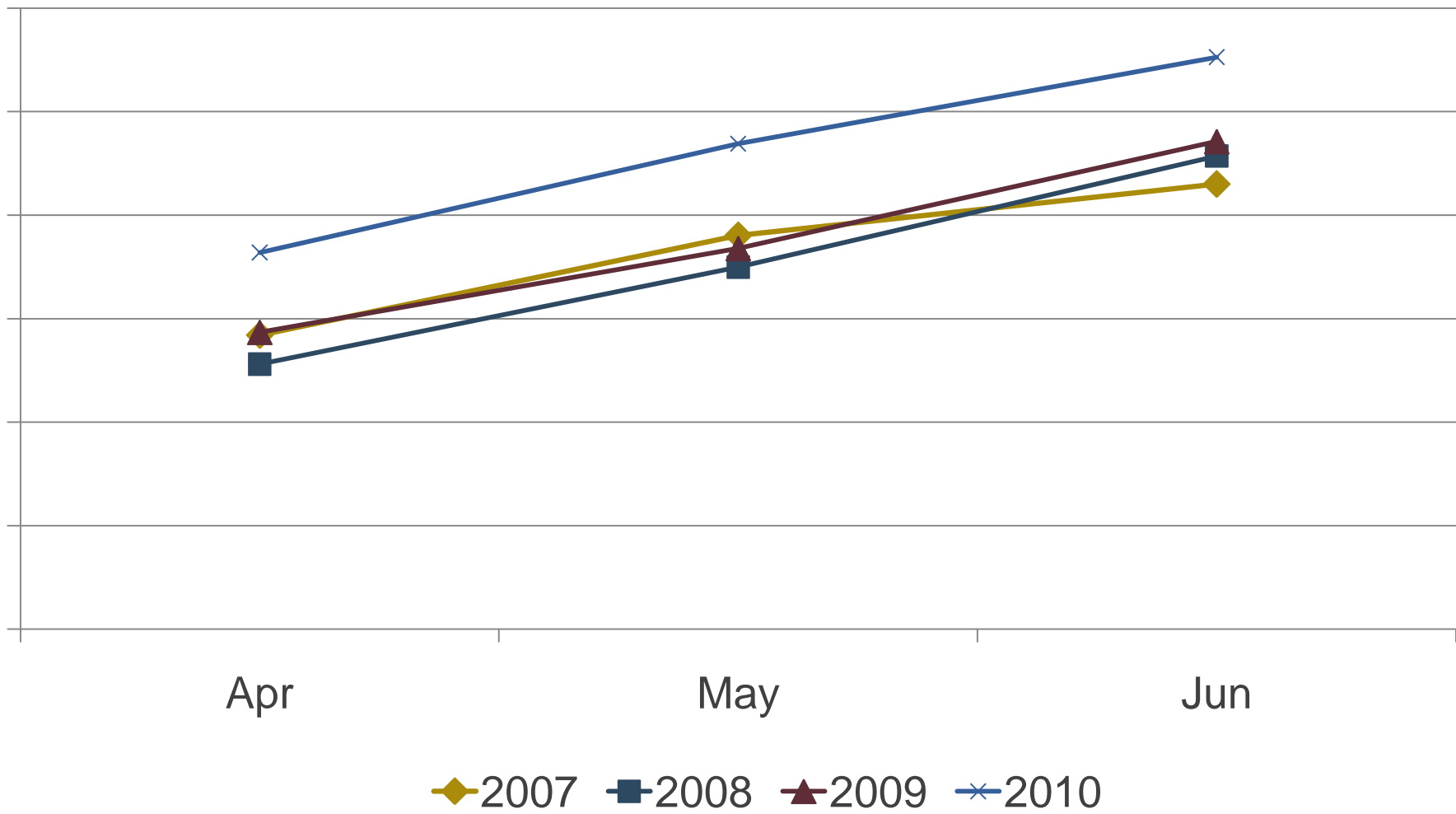


Data Source-MT Dept. of Revenue

MONTANA

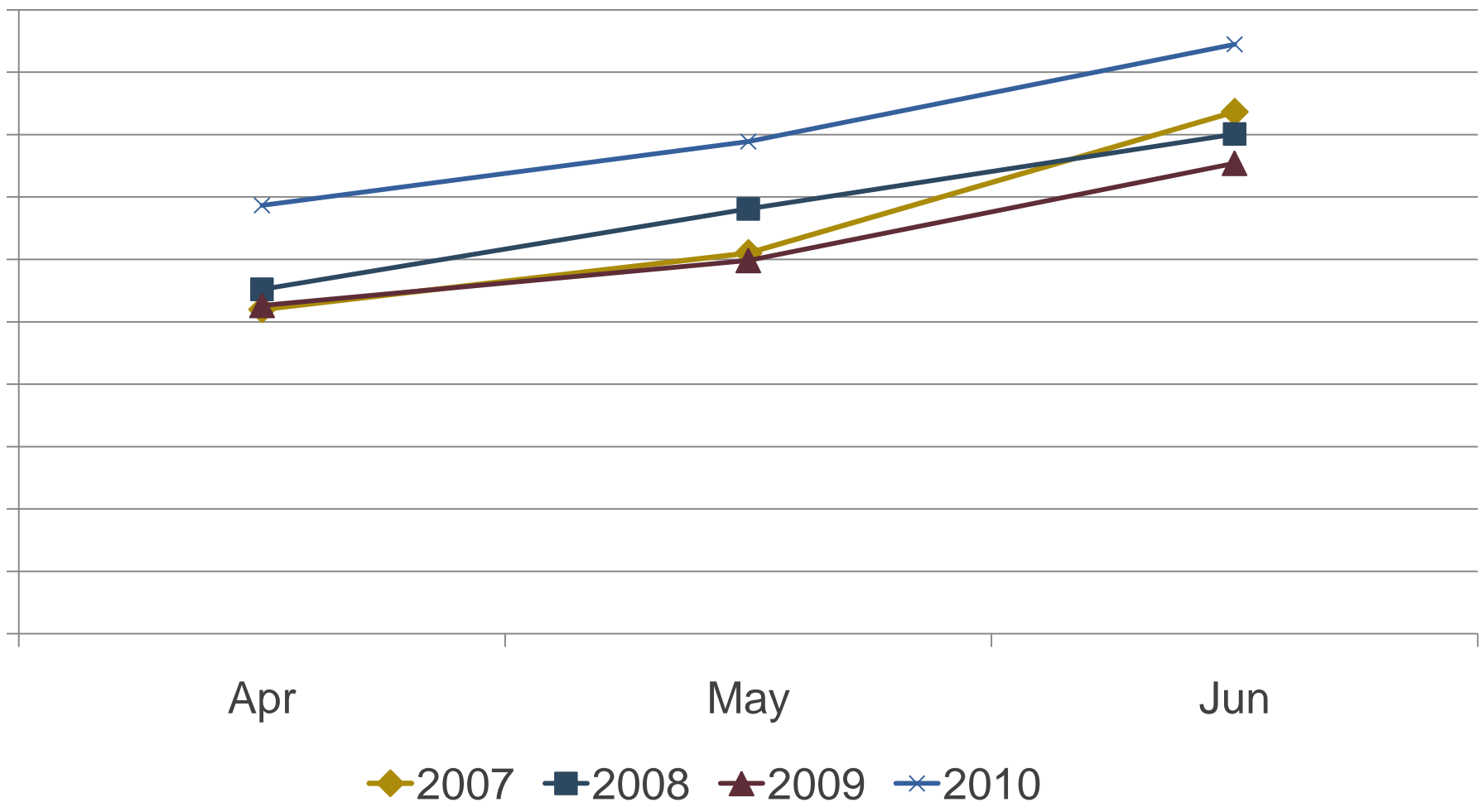
Office of Tourism, Department of Commerce • October 2010

MISSOURI RIVER COUNTRY



Data Source-MT Dept. of Revenue

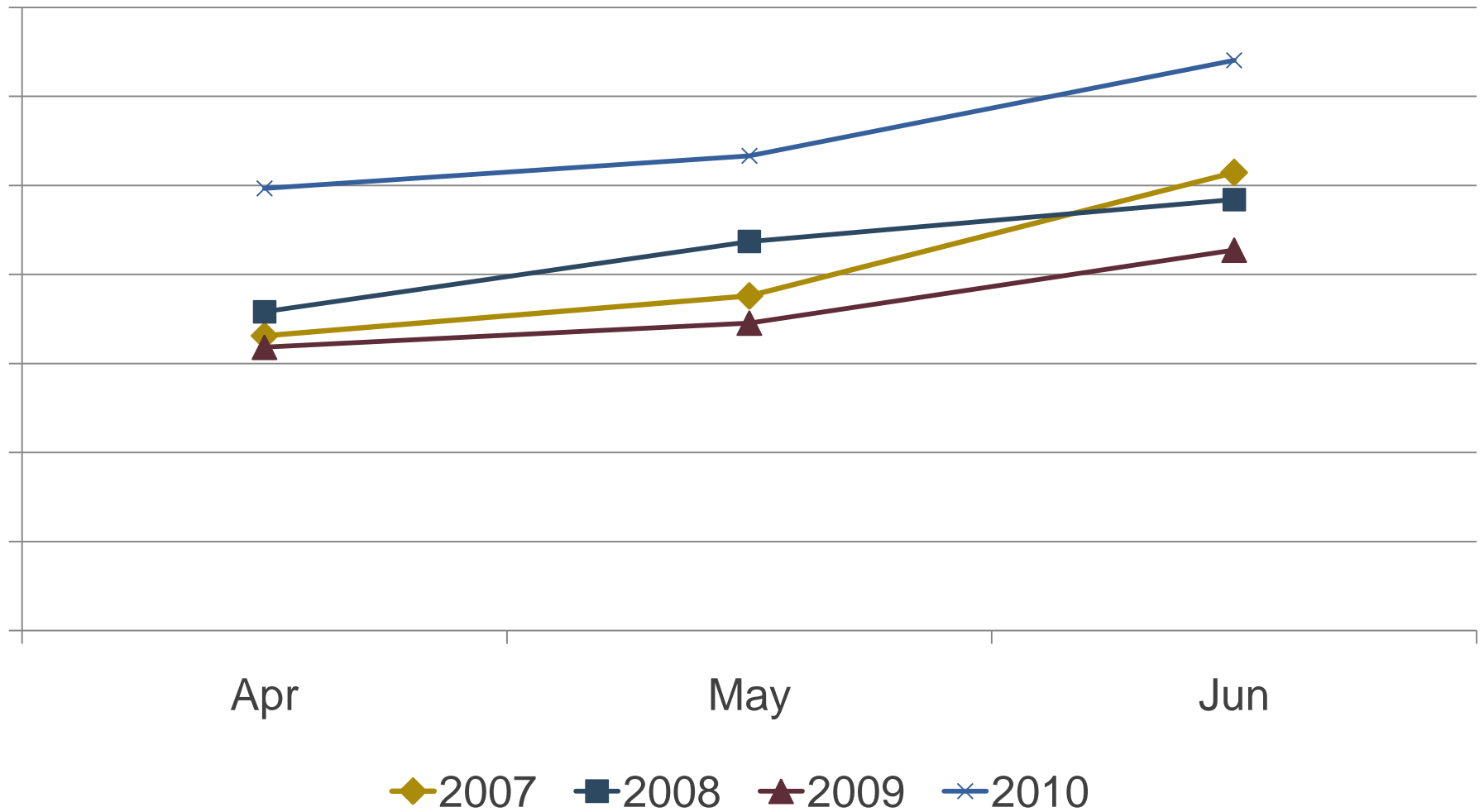
RUSSELL COUNTRY



Data Source-MT Dept. of Revenue

CASCADE COUNTY

(Inc. Great Falls)



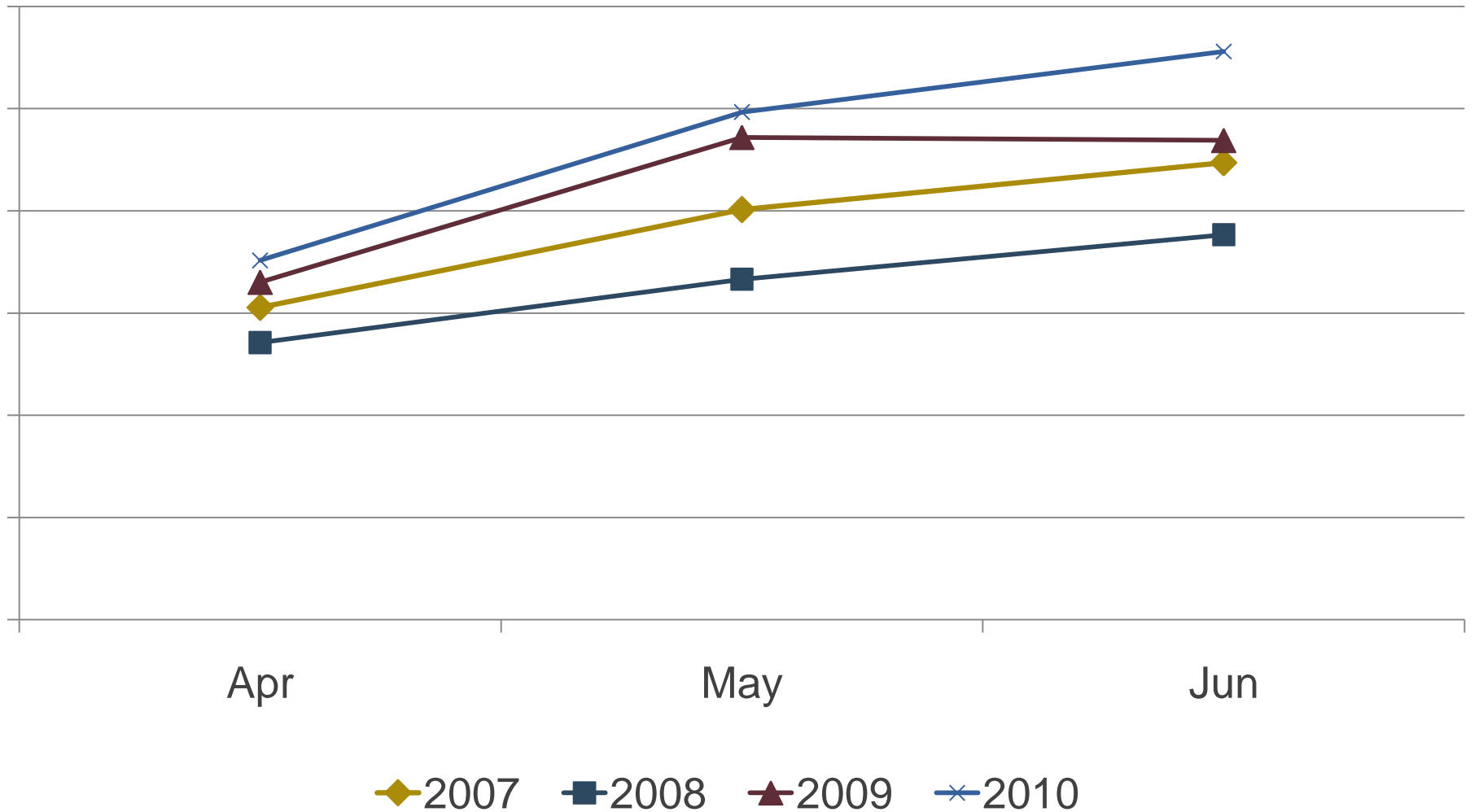
Data Source-MT Dept. of Revenue

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HILL COUNTY

(Inc. Havre)

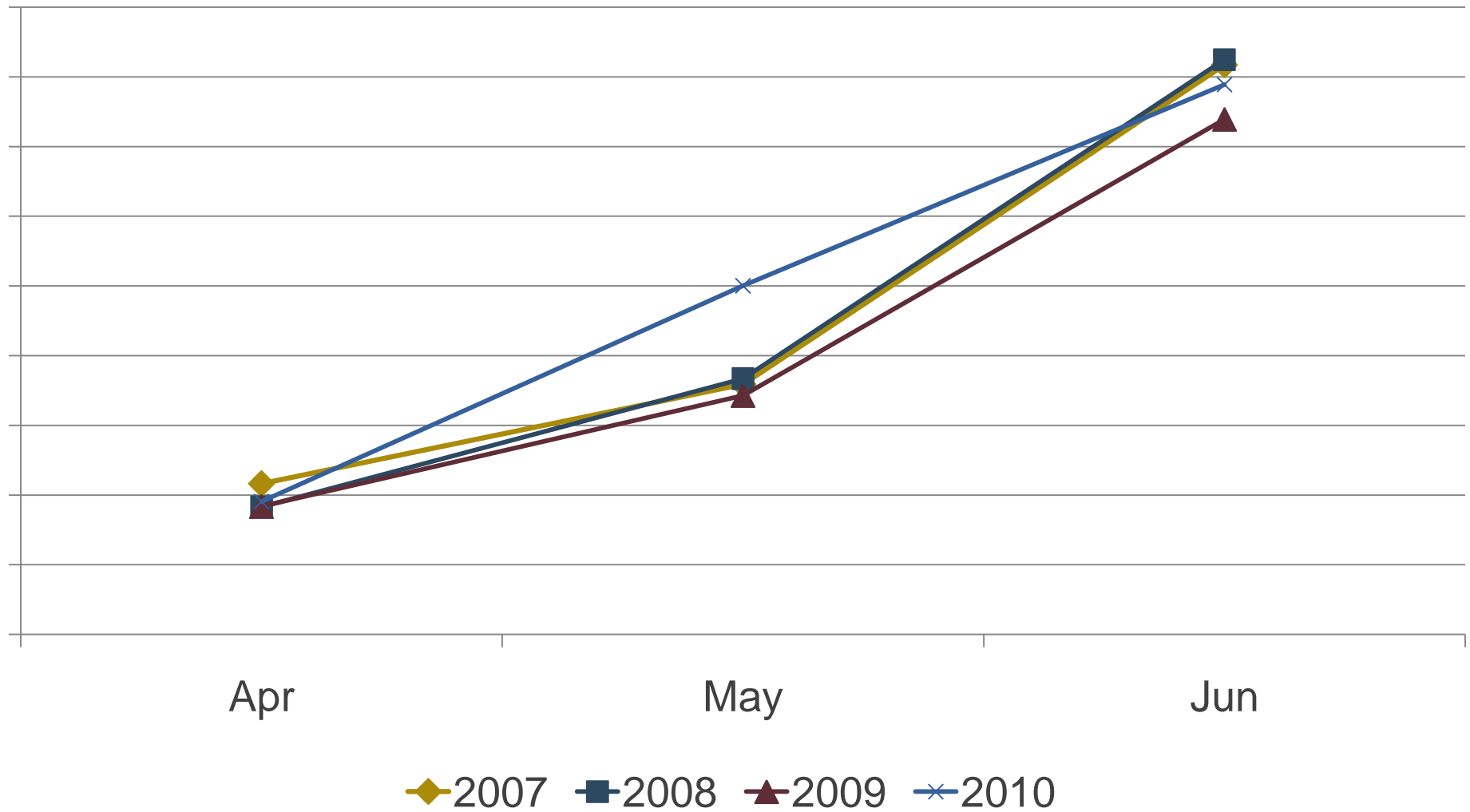


Data Source-MT Dept. of Revenue

MONTANA

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YELLOWSTONE COUNTRY



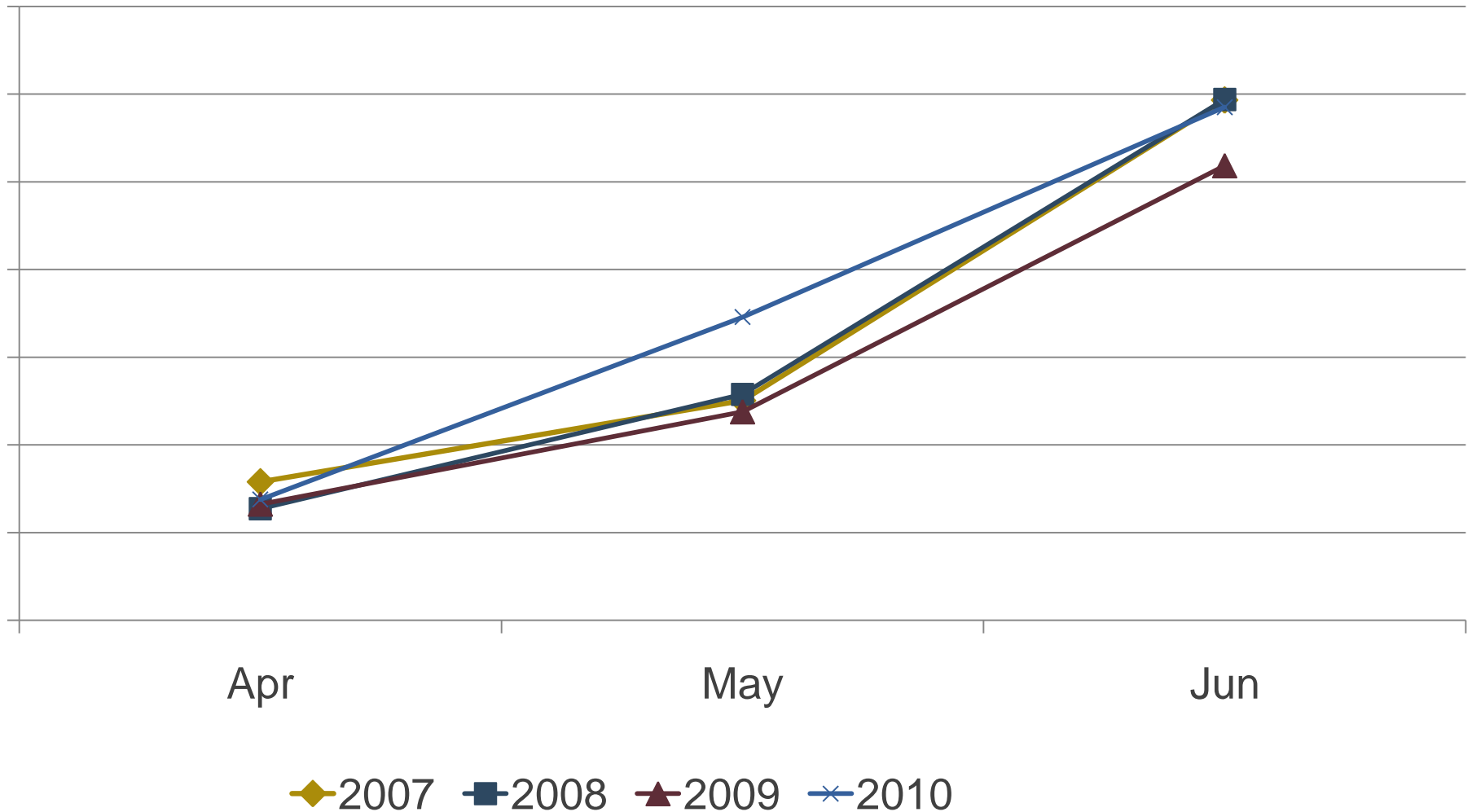
Data Source-MT Dept. of Revenue

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GALLATIN COUNTY

(Inc. Big Sky, Bozeman, West Yellowstone)



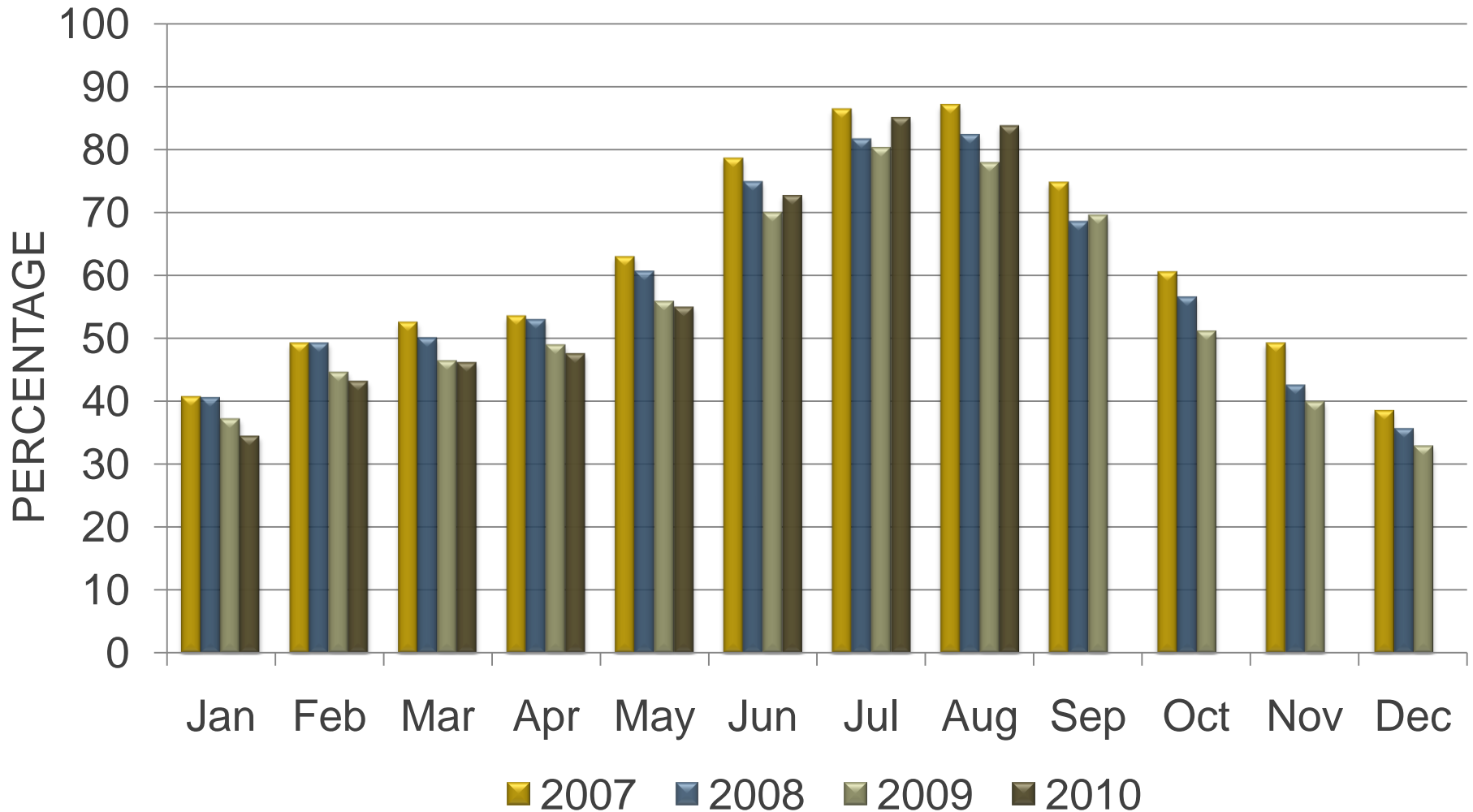
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SMITH TRAVEL RESEARCH 2007-2010

MT OCCUPANCY 2007-2010

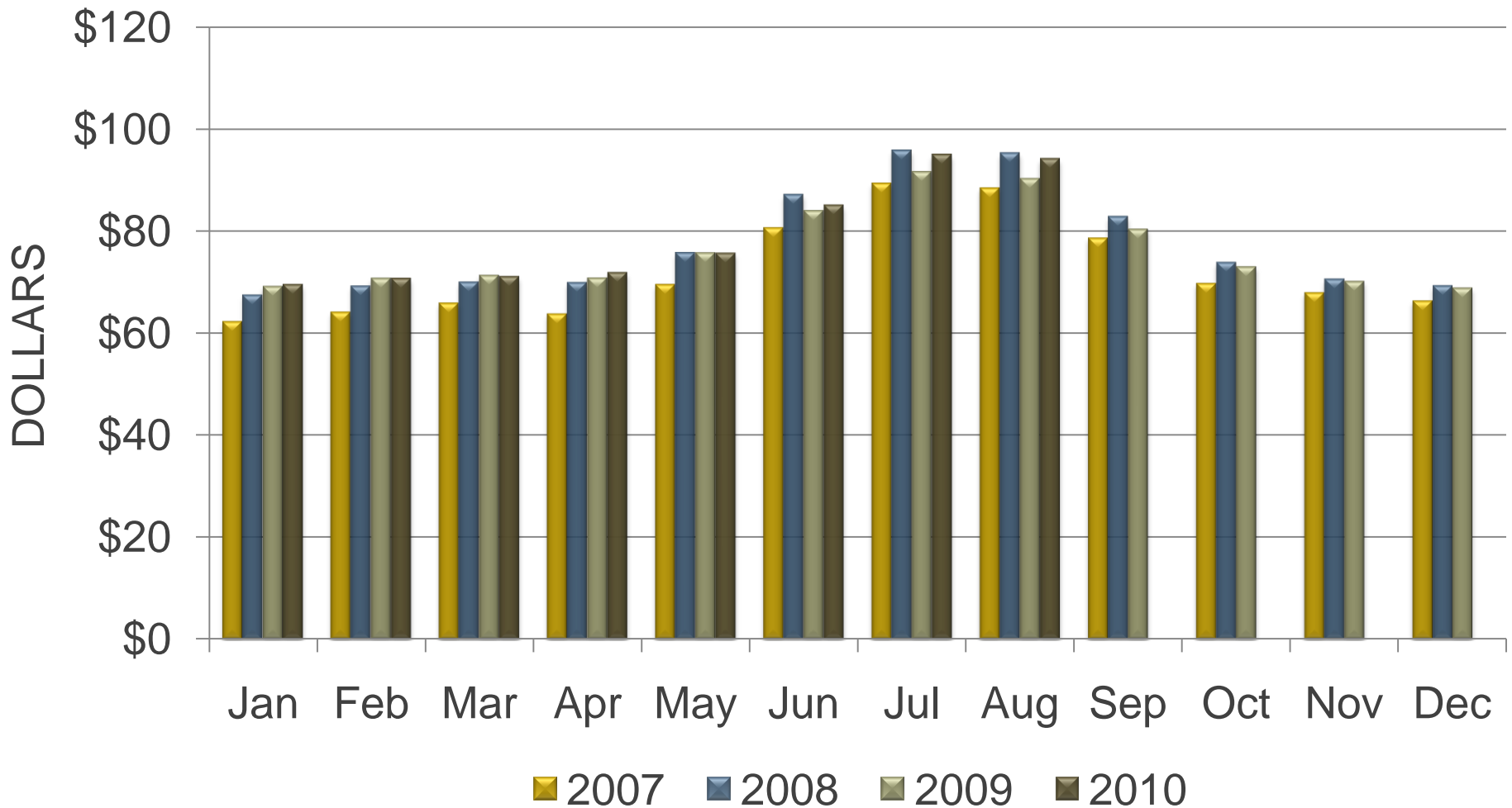


Data Source-Smith Travel Research

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MT ADR 2007-2010

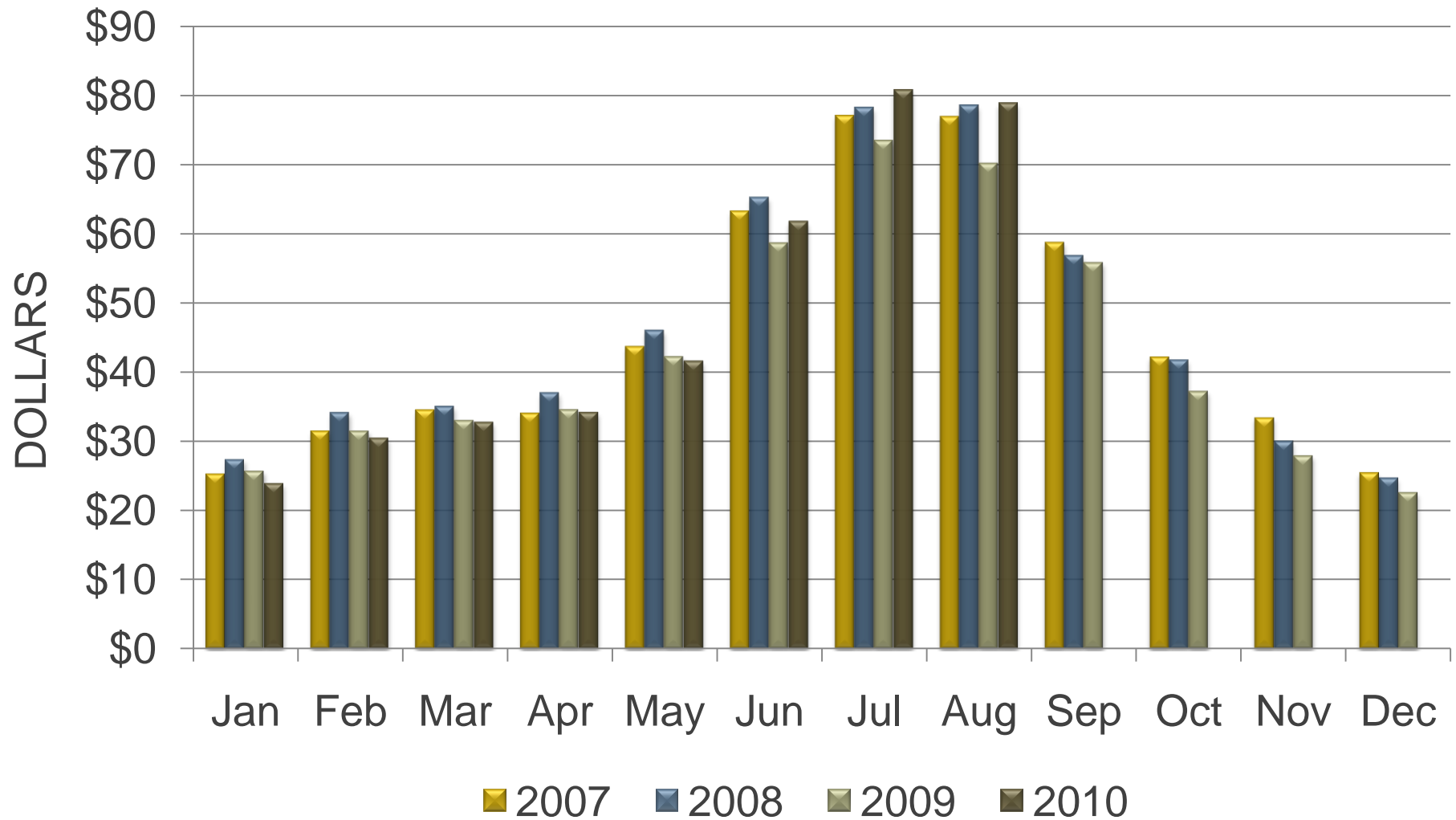


Data Source-Smith Travel Research

MONTANA

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MT REV-PAR 2007-2010

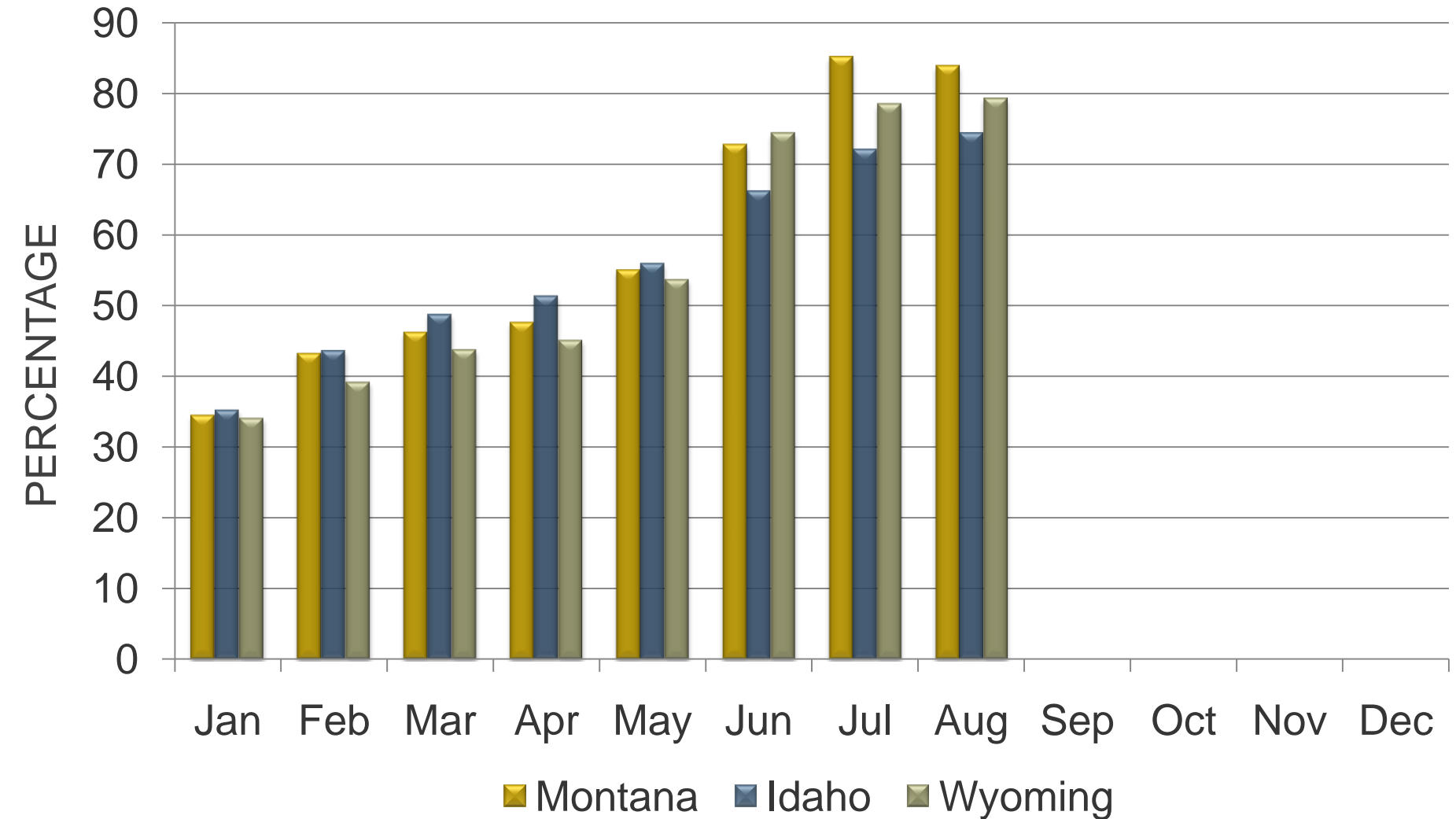


Data Source-Smith Travel Research

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2010 OCCUPANCY COMPARISONS

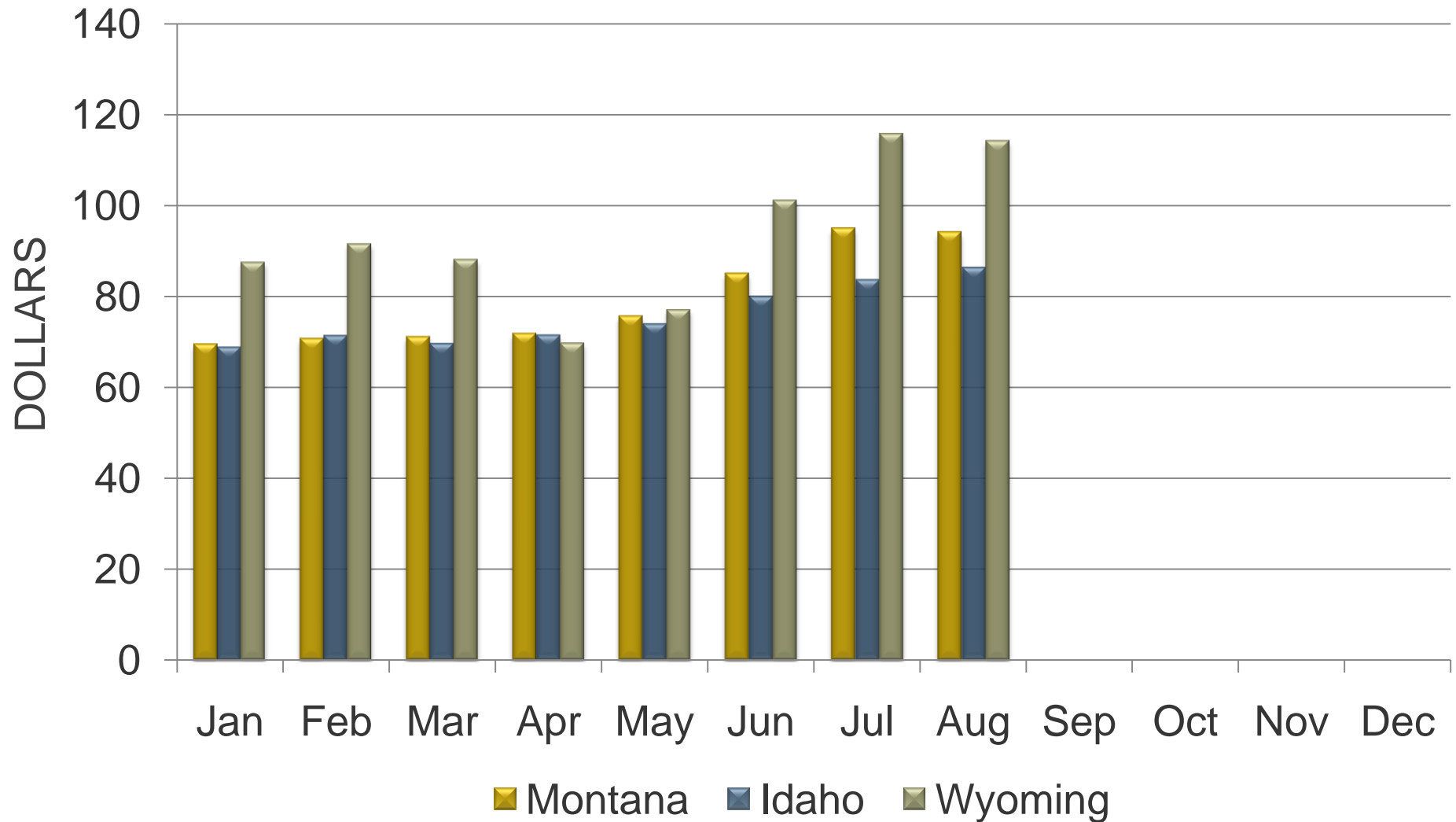


Data Source-Smith Travel Research

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2010 ADR COMPARISONS

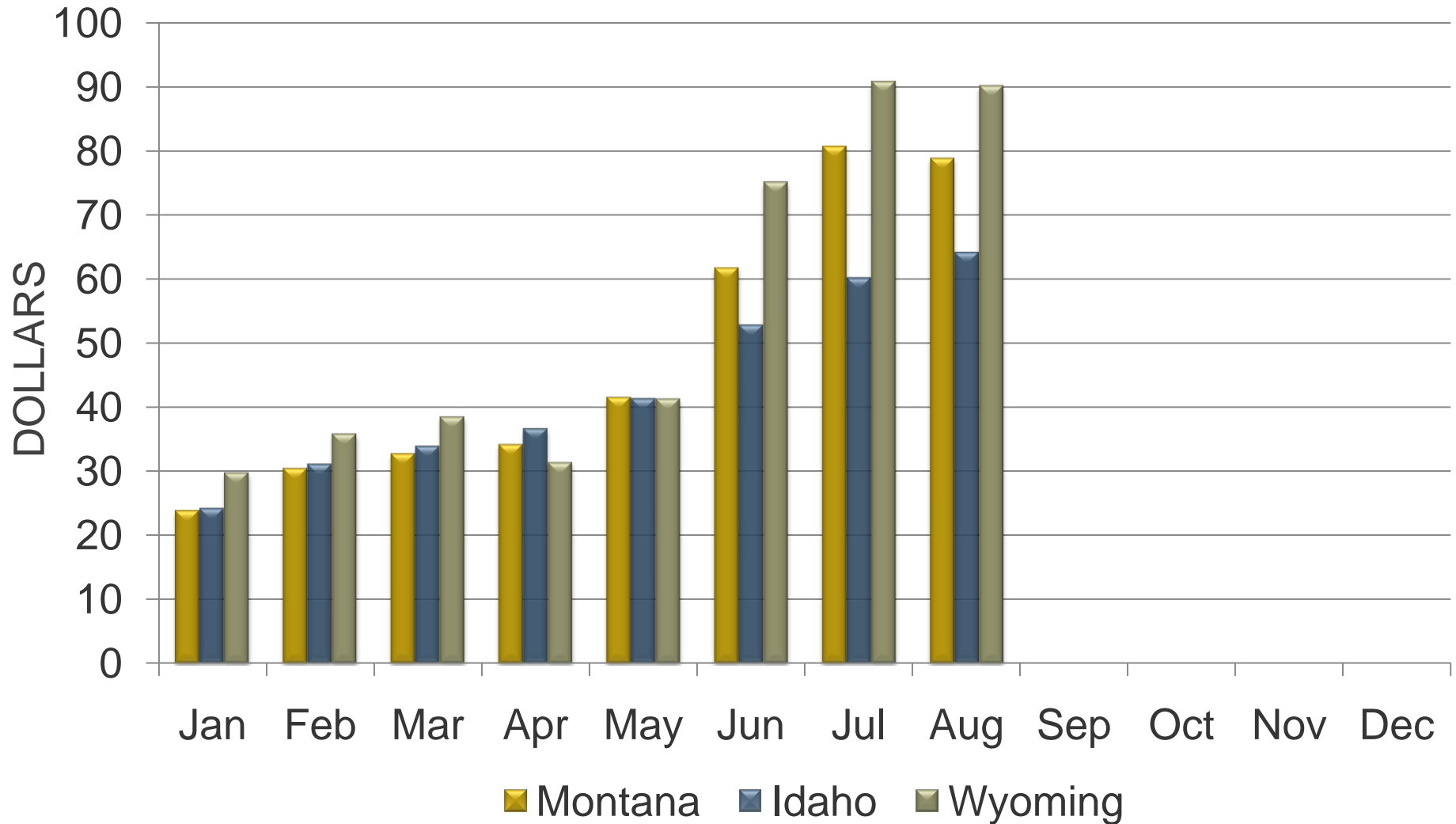


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2010 REV-PAR COMPARISONS

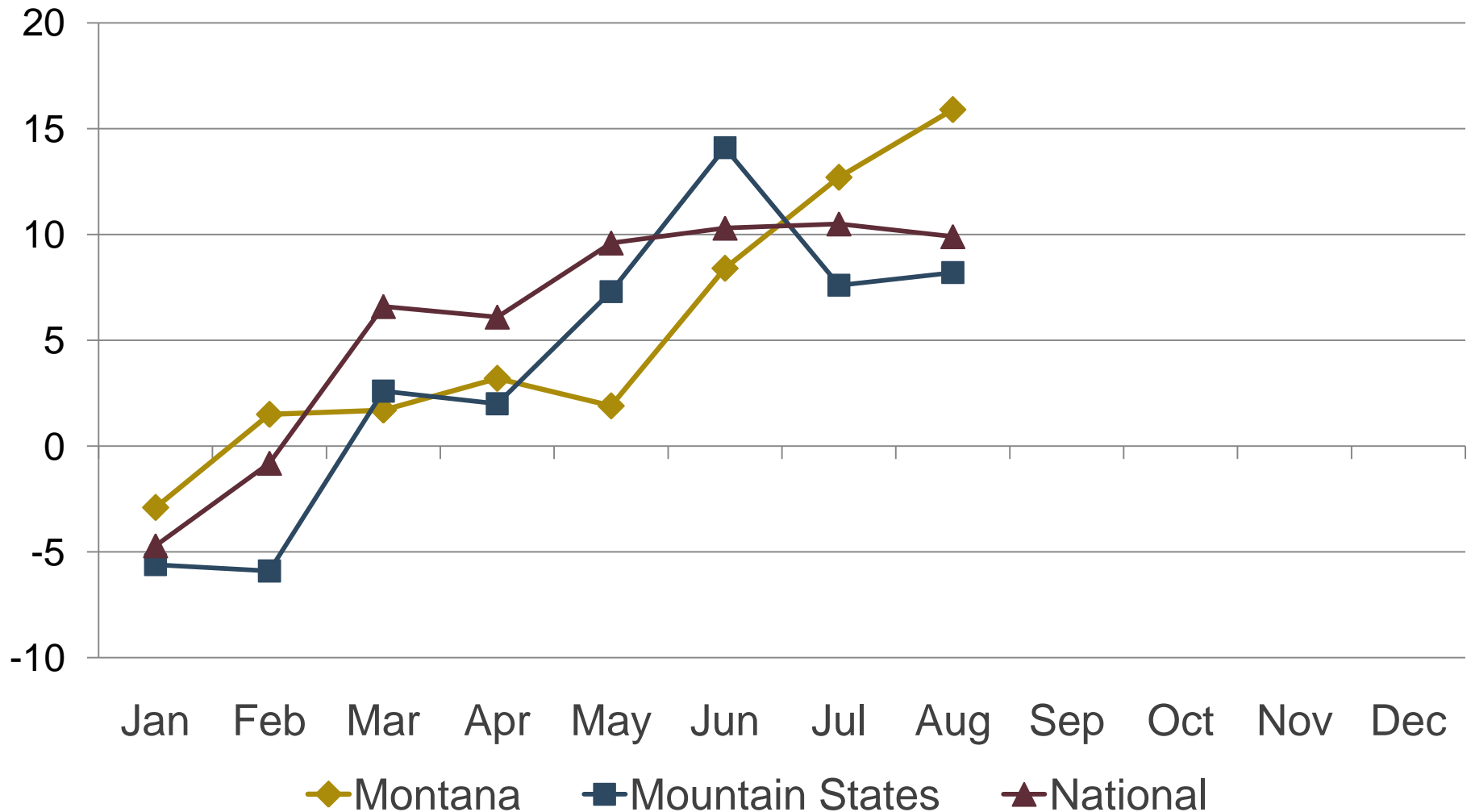


Data Source-Smith Travel Research

MONTANA

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ROOM REVENUE % CHANGE 2010 vs 2009



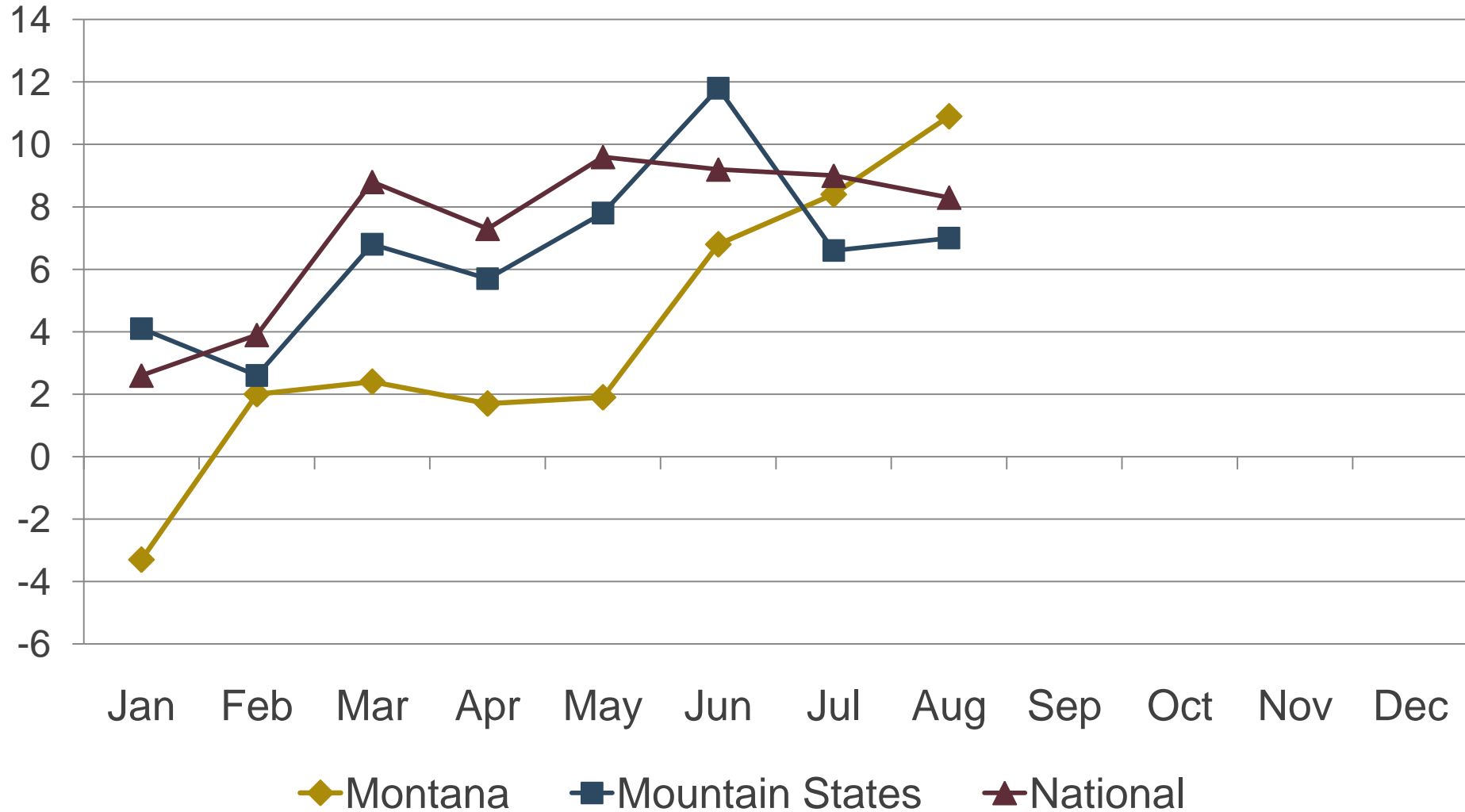
Mountain states include: MT, ID, WY, CO, UT, NV, AZ, NM

Data Source-Smith Travel Research

MONTANA

Office of Tourism, Department of Commerce • October 2010

ROOMS SOLD % CHANGE 2010 vs 2009



Mountain states include: MT, ID, WY, CO, UT, NV, AZ, NM

Data Source-Smith Travel Research

MONTANA

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2010 vs 2009 Year to Date (Jan-Aug) Occupancy Percent

	2010	2009	% Change
United States	58.8	56.0	5.0
Mountain	57.8	55.7	3.8
Montana	59.0	56.7	4.0
Billings	61.0	60.5	0.9
Bozeman/Yellowstone Area	58.2	55.5	4.9
Missoula/Butte	56.5	55.3	2.1
Helena/Great Falls	63.8	60.4	5.7

Data Source-Smith Travel Research

2010 vs 2009 Year to Date (Jan-Aug) Average Room Rate

	2010	2009	% Change
United States	97.70	98.70	-1.0
Mountain	91.69	94.22	-2.7
Montana	82.54	80.46	2.6
Billings	76.02	74.52	2.0
Bozeman/Yellowstone Area	91.77	88.90	3.2
Missoula/Butte	81.90	82.06	-0.2
Helena/Great Falls	75.07	76.90	-2.4

Data Source-Smith Travel Research

2010 vs 2009 Year to Date (Jan-Aug)

Total Revenue/Rooms Available/Rooms Sold

Segment	Revenue	Available	Sold
	% Change	% Change	% Change
United States	6.3	2.3	7.4
Mountain	3.7	2.7	6.5
Montana	7.5	0.7	4.8
Billings	2.9	0.0	0.9
Bozeman/Yellowstone Area	10.1	1.6	6.6
Missoula/Butte	2.2	0.3	2.4
Helena/Great Falls	5.7	2.4	8.2

Data Source-Smith Travel Research

Presentation will be available online at
www.travelmontana.mt.gov
under Research – Staff Presentations



USEFUL RESOURCES

Montana Office of Tourism

(406) 841-2870

www.travelmontana.mt.gov

(ITRR) Institute for
Tourism & Recreation Research

(406) 243-5686

www.itrr.umt.edu



Thank You